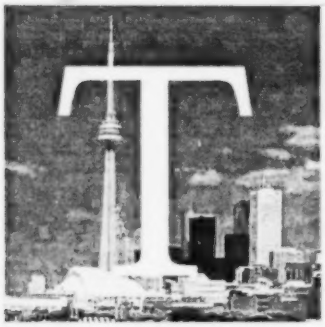
THE 2003 GTA RESIDENTIAL LAND INVENTORY SURVEY

Canada Mortgage and Housing Corporation
Ministry of Municipal Affairs and Housing



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Canada Mortgage and Housing Corporation
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CMHC SCHL

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Highlights of the 2003 Greater Toronto Area Residential Land Inventory Survey

- The inventory of units in approved development plans consisted of 71,432 (35.3%) single-detached houses, 14,014 (6.9%) semi-detached houses, 23,652 (11.7%) row houses, and 93,146 (46.1%) apartment units.

- The overall inventory of units increased by over 18.3% compared to the 2001 land inventory, for a total of 202,244 units in approved development plans. The supply of singles was up 3.3% and apartment units up 57.9%, while the supply of semis and rows fell by 13.9% and 10.8%, respectively.

- Across the GTA, the duration of supply of all unit types is shorter than in previous years. However, for the most part, the 2003 supply still meets the three-year target established by the Provincial Policy Statement. Using absorption scenarios A and C, duration of supply is estimated at 3.3 and 3.7 years for single-detached houses, 2.4 and 2.7 years for semi-detached houses and 3.9 and 3.8 years for row houses. The duration of supply for apartments continues to be more than adequate, at 7.5 and 11.3 years.

- Based on low mortgage rates and moderate employment and migration growth, starts peaked in 2003 exceeding 50,000 units and are expected to edge back to 46,000 in 2004. Demographic projections suggest that starts will edge even lower in the years to come.

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INTRODUCTION

The Greater Toronto Area (GTA) Residential Land Survey is a collaborative effort of regional and local municipalities in the GTA, the Urban Development Institute/Ontario (UDI/Ontario), Canada Mortgage and Housing Corporation (CMHC), PMA Brethour Inc. and the Ministry of Municipal Affairs and Housing (MAH). The 2003 survey is the eighth edition of the land inventory. It was conducted during the first quarter of 2003 and collects information on the number of units in active development applications. Previous surveys were completed in 1994, 1995, 1996, 1997, 1998, 2000 and 2001. No survey was completed in 1999 and 2002.

Survey Methodology

The survey gathers information on the number of housing units in active development applications. Local municipalities are the principal respondents to the survey. Regional municipalities and the City of Toronto compile the information and verify the data against regional data sources. Information recorded in the survey is based on municipal records as of January 1, 2003. Appendix I contains a detailed overview of the survey methodology.

Units in Development Applications

For each development application, municipalities identified the number and type of housing units proposed for development. This information was placed in one of four stages of development approval, based on development approvals received as of January 1, 2003.

The four stages of development approval are defined below:

Stage 1: Captures applications where the local municipal councils have adopted the required official plan amendments (OPAs), but where final OPA approvals are still required from the regional approval authority.

Stage 2: Captures applications waiting for zoning amendments and plan of subdivision approvals.

Stage 3: Captures applications waiting for site plan approval (where this is required) and/or plan of condominium approval where building permits have not been issued.

Stage 4: Captures units in approved development plans, for which no building permits have been issued.

The survey uses five different residential unit types. These are single-detached, semi-detached, rowhouses, other multiples (such as duplexes) and apartments. For the purpose of the survey analysis, other multiples and apartments are combined.

A development application is included in the survey if it results in a net gain of three or more housing units. As a result, new supply achieved through small infill housing projects, including the development of accessory units within existing structures, is not captured in the survey. In addition, projects which can be developed as-of-right without obtaining planning approvals (e.g., infill housing or conversions where the zoning is in place, and which are not subject to site plan approval) are not captured in the inventory.

The intent of the survey is to collect information on active development applications. Municipalities are asked to exclude from the survey any development proposals that have not been active for five years (since January 1, 1998). For example, a development application would be excluded from the survey if:

- All planning approvals were received prior to January 1, 1998, and building permits have yet to be issued; or
- Further planning approvals are required but there has not been any activity with respect to these approvals since January 1, 1998.

GTA ECONOMIC OUTLOOK

(While the survey methodology is discussed elsewhere, it is important to note here that the 2003 GTA Land Inventory Survey is based on municipal records as of January 1, 2003. The survey is, therefore, a "snapshot" of development application information at the beginning of 2003. As a result, the discussion on the economic outlook for the GTA, which follows, is intended to provide the reader with the economic outlook based on the conditions that existed in 2003. It is within this context that the reader should approach the GTA Economic Outlook)

The duration of supply of residential units available for development depends on the state of housing market demand. Factors such as the state of the economy and demographics impact demand. Over the short term, employment conditions and interest rates override any other influence on the housing market while migration and demographic projections have more long-term implications.

Employment

U.S. Businesses Shed Labour but Relief in Sight

Corporate revenue growth in the U.S. was at a standstill in 2003, while U.S. business inventories had been run down at an alarming rate through 2002 following the bursting of the high tech bubble. Despite early year geopolitical concerns, the U.S. economy placed itself in an enviable bounce back position thanks in part to a number of factors. Firstly, job shedding helped trim company costs and in turn helped improve labour productivity. Improved productivity gave a boost to corporate profits and led to a recovery in business spending. Indeed, the US job market should benefit from this through 2004. Secondly, trade imbalances, pressures on corporate profits, geopolitical concerns, talk of deflation and lower short term interest rates relative to the rest of the industrialized world put downward pressure on the U.S. dollar. This helped kick start manufacturing activity and hiring in related export/trade sectors and provided much needed pricing power to U.S. companies. Finally, tax cuts, which were delivered in 2002, helped boost consumer spending. This should assist U.S. household budgets, which have solely relied on refinancing against home equity, to boost discretionary income.

Toronto's Labour Market Resumes Uptrend

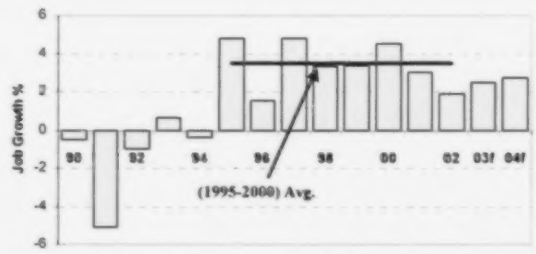
The service sector weighed on Toronto's labour market for much of 2002. Bad loans to high tech and communication sectors coupled with declining business for wealth management divisions curtailed hiring by major financial institutions. Mutual fund companies also witnessed major redemptions causing consolidation in this sector. Hiring in the travel and aerospace sectors was negatively impacted by diminished travel in the wake of global terrorism. Helping offset this weakness was strength in health, education and construction related sectors. The big story for 2002 was the high paying manufacturing sector. Auto incentives and strong pent-up demand from domestic and U.S. consumers yielded strong job growth in the high paying manufacturing sector.

However, in 2003, the Toronto job market gained momentum on the strength of a pickup in hiring in the all important service sector. For the first three months of the year the Toronto area added 23,000 jobs on a seasonally adjusted basis. The rate of job growth was 2.7% and compared favorably to a 2002 rate of job growth of 1.9%. Corporate profitability in financial and insurance firms in 2003 has continued to improve helping boost employment in 2004. Alternatively, narrowing pent-up demand for autos, a stronger Canadian dollar and a gradual U.S. economic recovery limited employment growth in the manufacturing sector through 2003. Furthermore, a booming residential construction industry kept construction related employment strong, as did the double cohort phenomenon keep hiring in the education sector firm.

In addition, housing consumption decisions represent a long-term commitment of capital and, as such, decisions are most often impacted by gains/losses in full time employment. Levels of full time employment in Toronto have been trending up with few if any interruptions since the last recession. Full time employment for the prime home buying public aged 25-34, while performing better at the beginning of the 1996 business cycle, has recently lagged job growth strength in the repeat buyer group aged 45-64.

Having said that, rates of Toronto job growth witnessed during the dot.com years are also clearly behind us. In the period between 1995-2000, the Toronto economy pumped out well over 400,000 jobs. Nearly 50% of that job growth took place over the high tech boom years of 1999-2000, registering an average rate of job growth of 3.7%. While 2002 marked the eighth year of expansion, employment growth did slow to a seven year low of 1.9%. Job growth averaged between 2.0% to 2.5% in 2003. Look for this to continue through 2004. Figure 1 illustrates the average rate of job growth per year for Toronto.

Figure 1: Toronto Job Growth
...slows from late 90s record setting pace



Source: Statistics Canada, CMHC Forecast

Interest Rates

The Bank of Canada pulled the trigger in March 2003 and raised the overnight rate by one quarter of a percent to 3.25%. The hike in March 2003 followed increases totaling 75 basis points (0.75%) seen in the previous year. Short-term interest rate spreads between Canada and the U.S. ballooned above 200 basis points. This reflected the divergent paths taken by both economies with the U.S. working off excess capacity while Canada's economy remained resilient insulated by a cheap loonie and stronger energy prices. These are factors that contributed to Canada's GDP out performance over the U.S. during the last several years.

Adding another twist for the Bank of Canada was a Canadian dollar, which showed signs of strength and softened the pace of inflation and exports to the U.S.. While an appreciating Canadian dollar put a lid on Canadian-U.S. interest rate spreads, this did not curb the broader trend of rising rates seen in the latter part of 2003 and expected in 2004. To be sure, North American interest rates adjusted for inflation are near historical lows versus other G7 countries.

Short-term mortgage rates move in tandem with the prime rate while mid and long-term mortgage rates vary in response to the cost of raising funds in the bond market. Mortgage rates will rise, but remain favorable by historical standards. The one, three and five year closed mortgage rates are expected to be in the 4.25-5.25, 5.75-6.75 and 6.25-7.25 percent ranges respectively, in 2004. Alternatively, rates may rise by less than expected if the U.S. recovery stalls, the Canadian dollar appreciates above expectations and if inflationary pressure subsides. Figure 2 illustrates the average monthly mortgage payments for Toronto homes, by year.

Figure 2: Toronto Mortgage Carrying Costs
...stabilize but headed up

Source: Bank of Canada, TREB, CMHC

Homeownership Costs

Incomes to Play an Important Role Ahead

Recent CMHC research has indicated that for every 100 basis point (1%) decline in borrowing rates, Toronto resale housing volumes have historically increased by approximately 5000 units. Typically, new home demand lags by a few months thereafter. Not surprisingly, it suggests that among other things, housing demand is quite sensitive to changes in mortgage rates. However, the servicing of debt also matters and household income is key here. Despite increases in mortgage loan amounts, a strong local labour market has benefited household income and has made carrying costs manageable.

High-ratio mortgages have been most common recently, largely due to a market driven by first time buyers who have limited pool of immediate resources. With rates bottoming out and prices continuing to climb, a common question is whether this will pose a higher risk of defaults come time to refinance. While variable rate mortgages, due to a drop in short-term rates, have been more popular recently, most first time buyers have locked in at a fixed rate. Furthermore, despite a projected climb in borrowing rates, they will still remain affordable in the immediate future. Finally, while most recent buyers are cash poor, on average recent homebuyers remain income rich, as per recent median household income trends among first time buyers. This should help service existing debt into the future.

While Toronto housing costs as a share of income edge up over the next few years, they will still remain manageable relative to the affordability crunch experienced in the late 1980s. Then, unlike now, many prospective buyers were priced out of the market translating into a more short-lived real estate cycle. Figure 3 illustrates the average annual housing costs for Toronto homeowners as a share of household income.

Figure 3: Toronto Annual Ownership Costs*
as share of household income

Source: Bank of Canada, Statistics Canada, TREB, CMHC Forecast

* Assumes: 25%dp, 25 yr amor, taxes (1.25%), 5 yr mtg, avg resale price

Demographics

Immigration weakens in late 2002 and 2003

Immigration is driving Toronto migration trends and is feeding into current and future housing demand. Immigrants typically jump into homeownership after having been established in Canada for some time and have accumulated a down payment on a home. A larger percentage in the first 10 years typically rent and only with time do ownership rates of foreign born residents approach those of Canadian born households. After hitting record immigration levels in 2001, rising geopolitical tensions following 9-11 has negatively impacted global travel. Increased security screening and tighter entrance requirements have also weighed on immigration flows into Canada in late 2002 and through the first quarter of 2003. Preliminary Toronto immigration flows show March 2003 numbers down sharply. Less stringent immigration rules implemented in late 2003 has added some relief recently. However, it is likely that in the immediate term, immigration levels have peaked and flows from the rest of the world are not expected to grow as strongly in 2004.

Toronto Price Increases Converge to that in the Rest of Ontario

Net migration flows are also driven by flows between Toronto and the rest of Ontario. In previous issues of the GTA Residential Land Inventory Survey, we alluded to relative price changes impacting the flow of people between Ontario centres. Relative price changes favored centres outside of the GTA at the peak of the last cycle. The rampant speculation among second time buyers and the belief that a future buyer would be there to pay a higher price led to real estate inflationary spirals in the GTA during late 1980s. While this priced many out of the market, the story early in this decade, has been different. Much of the pent-up demand from the late 80s and early 90s has led to stronger demand with no doubt first time buyers driving this market. Indeed, real estate fundamentals have benefited many centres outside the GTA, bringing price increases there in line with GTA performance. While rising interest costs will deteriorate intra-provincial migration flows, the GTA should avoid the huge outflows witnessed during the late stages of the last cycle.

Net migration into the GTA will slow from the hectic pace witnessed over the past several years. Strong job growth in the rest of Canada, coupled with deteriorating immigration flows pulled net migration down in both 2002 and 2003 to 85,000 and 60,000 respectively, before an expected bounce back to 65,000 in 2004. Figure 4 illustrates migration out of the Toronto CMA into more affordable neighbouring municipalities. Figure 5 illustrates the average number of people moving into Toronto, by year.

Figure 4: Toronto Migration Outflows
...should deteriorate but off outflows of late 80s

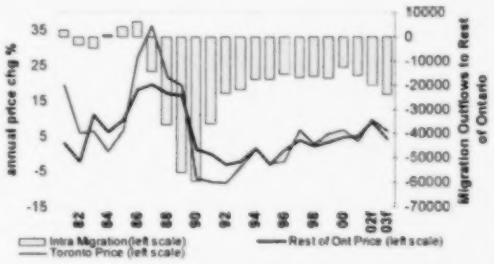
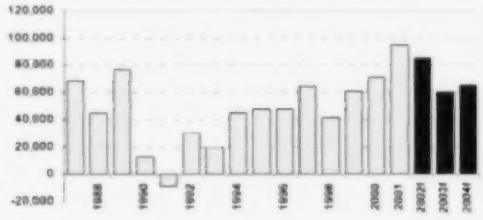

annual price chg %
Migration Outflows to Rest of Ontario
Intra Migration(left scale)
Toronto Price (left scale)
Rest of Ont Price (left scale)

Figure 5: Toronto Net Migration
...remains high but off record levels



Source: Statistics Canada, CMHC Annual Estimates

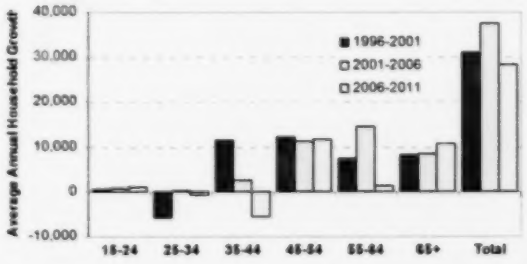
Household Formation

Stronger for those Aged 45+

Strong migration into Toronto has, in the interim, partly added relief to an ageing local population trend. Indeed, nearly 50% of all migrants that have come into Toronto recently have been between the ages of 25 to 44. According to industry contacts, some of these buyers, particularly those from other regions of Canada, were financially capable of jumping into the ownership market sooner, contributing to the recent surge in home sales across the GTA.

The long-term ageing population story, however, is still in place. While annual household growth is expected to continue through 2006, the composition of that growth is changing. With live births in Ontario peaking in the early 1960s, a larger segment of the population is shifting to a higher age cohort. While an interest rate induced surge in home sales has been drawing down the pool of first time buyer pent-up demand, demographics will also be weighing on the 25 to 44 age cohort. CMHC projections point to stronger growth in the traditional move-up buyer segment aged 45 to 64 between 2001 and 2006. Figure 6 illustrates the average growth in household formation by age group.

Figure 6: Toronto Demographic Projection
..household formation on rise particularly for move-up market



Source: Statistics Canada, CMHC Potential Housing Demand Model Estimates

Outlook for Housing Demand

While residential starts grew by over 8% to just over 48,000 units in 2002, home starts peaked in 2003 and are expected to edge lower in 2004. More accommodating resale markets over the next few years suggests less spillover demand from the resale market as supply is expected to outpace demand. Likewise, rising rental market vacancies are expected to dampen construction of private rental apartment units. Nonetheless, the lagging impacts of strong condo apartment new home sales and strong in-migration of years past sparked record construction levels in 2003. GTA home starts are expected to peak at 50,000 units in 2003 and are expected to edge down to 46,000 units in 2004.

ABSORPTION SCENARIOS*

The potential duration of supply of residential units available for development, presented in the survey results section, is based on three absorption scenarios. For simplicity, these scenarios are referred to as A, B and C.

Scenario A - This annual absorption rate is based on actual demand, using the average annual number of units covered by building permits issued for different residential types during 2001 and 2002. Table 1 shows absorption scenario A for all regions in the GTA, by house type.

Table 1: Scenario A

	Singles	Semis	Rows	Apts	Total
Durham	3,305	489	363	76	4,233
Halton	2,336	528	1,214	282	4,360
City of Toronto	1,568	755	911	10,461	13,695
Peel	6,790	2,748	1,628	824	11,990
York	7,925	1,308	1,884	758	11,875
GTA	21,924	5,828	6,000	12,401	46,153

Source: Statistics Canada

Scenario B - This scenario inflates scenario A figures by 50%. Table 2 shows absorption scenario B for all regions in the GTA, by house type.

Table 2: Scenario B

	Singles	Semis	Rows	Apts	Total
Durham	4,958	734	545	114	6,350
Halton	3,504	792	1,821	423	6,540
City of Toronto	2,352	1,133	1,367	15,692	20,543
Peel	10,185	4,122	2,442	1,236	17,985
York	11,888	1,962	2,826	1,137	17,813
GTA	32,886	8,742	9,000	18,602	69,230

Source: Statistics Canada

Scenario C - This scenario is based on historical data consisting of five-year annual averages of building permits issued for different residential unit types (1998-2002). This information is then used to extrapolate longer-term absorption patterns. Table 3 shows absorption scenario C for all regions in the GTA, by house type.

*** Note: Based on preliminary building permits issued data.; Stats Can mid year revisions occur.**

Table 3: Scenario C

	Singles	Semis	Rows	Apts	Total
Durham	2,940	465	448	132	3,985
Halton	2,327	368	1,067	659	4,421
City of Toronto	1,288	569	902	5,965	8,724
Peel	5,391	2,356	1,595	732	10,074
York	7,384	1,440	2,235	766	11,825
GTA	19,330	5,198	6,247	8,254	39,029

Source: Statistics Canada

The reader will note that in scenario C, demand in most cases is lower than in scenarios A and B, when we look at average permits issued. The reason for this trend is that Scenario C is a long-term historical view of permit activity across the GTA. This long-term absorption scenario tends to smooth out movements in the real estate cycle. Strength in the latter part of the cycle is offset by weaker construction activity at the beginning of a cycle, in this case the period of the late 1990s. This subsequently explains the more generous duration of supply conditions predicted by scenario C. Looking forward, scenarios A and C provide a more accurate account of likely absorption activity over the short and longer run respectively, particularly as GTA housing starts are set to peak in 2003.

These scenarios are not intended to be seen as forecasts of actual housing demand. They represent three possible outcomes for future housing demand. The scenarios presented here cover a wide range of possibilities and it is most likely that future demand will fall somewhere within that range.

SURVEY RESULTS

The GTA Residential Land Inventory Survey gathers information on the number of units in active development applications. The information is based on municipal records as of January 1, 2003.

The survey methodology tracks units in development applications by unit type and development approvals. In this analysis, units have been categorized into four groups: singles, semis, row houses and apartments. The apartment category includes units that were recorded as "Other Multiples" in the survey. Other Multiples includes grade related dwellings such as some link homes (more than three homes linked), duplexes and stacked townhouses.

The maintenance of a strong inventory of residential units available for development in the GTA plays an important role in ensuring a healthy and properly functioning housing market. A strong inventory of units of all types helps ensure that:

- Consumers have product choice when looking to purchase new homes;
- Development can proceed in a timely fashion, with the ensuing economic benefits of more jobs and consumer confidence; and
- Upward pressure on land prices and house prices is moderated during periods of increasing demand for new housing.

The importance of planning for a healthy supply of residential units is demonstrated in the Provincial Policy Statement which requires that municipalities maintain at least a three-year supply of each unit type in draft approved or registered plans of subdivision. This policy provides a useful measure for monitoring the supply of units in the GTA. Furthermore, the active participation of municipalities, UDI, CMHC, the Province and PMA Brethour in the development of this survey, suggests a general recognition of the value of this information.

The discussion of the survey results in this report is intended to identify units that are ready for development. This includes units in draft approved or registered plans of subdivision and units in other development plans that are either fully approved or are proceeding through site plan approval. In the discussions that follow, these plans are referred to as ***approved development plans*** and represent units in stages two, three and four of development approval.

The supply of units in plans at earlier stages of development approval (i.e., development applications covered by an OPA, but the OPA has not received final approval) will also be discussed, since these proposed units will play an important role in the lot inventory in the years to come. For simplicity, these units are called ***additional supply*** and represent units in stage one of development approval.

The survey does not capture the supply of land in approved urban areas available for residential development for which no development applications have been received, or where OPA approval has not yet been obtained.

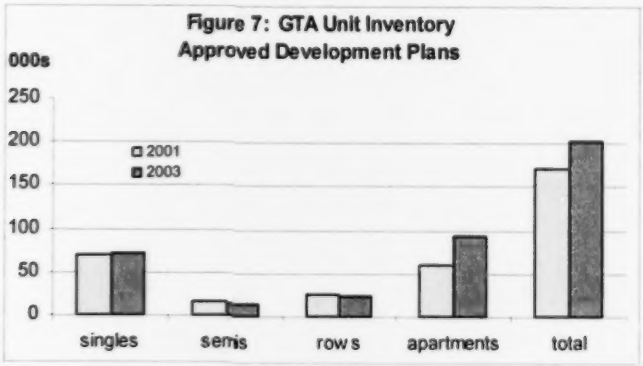
As discussed in the previous section, the duration of supply is estimated using three absorption scenarios: A, B and C. Information on the three absorption scenarios for each municipality can be found n Appendix 2. Detailed survey results tables contained in Appendix III illustrate the potential duration of supply of residential units by unit type for each absorption scenario. The discussion of the survey results presented below will focus on absorption scenarios A and C. These scenarios capture both current market conditions, and a potential slowing housing market over the next few years. To illustrate this point, CMHC's 2003 forecast of housing starts in the GTA is approximately 50,000 units. Scenario A assumes an annual housing absorption rate of roughly 46,000 units, while scenario C assumes a long-term absorption rate of approximately 39,000 units.

GTA SUMMARY

Total supply of units in the GTA increased by 31,350 units (18.3%) in 2003 compared to 2001, for a total of 202,244 units in approved development plans. This was due, in large part to an increase in the supply of apartment units. In comparison, the 2001 survey indicated only a 0.03% increase in supply over the 2000 levels.

Singles and apartments continue to be the largest component of supply across the GTA, representing 35% and 46% of total supply respectively. Singles and apartments have remained the predominant supply of housing units in the GTA since this survey was started in 1994. Together, semis and row houses represent about 19% of total supply in approved development plans, a drop from 25% of the GTA's overall supply, which they have consistently held since 1998.

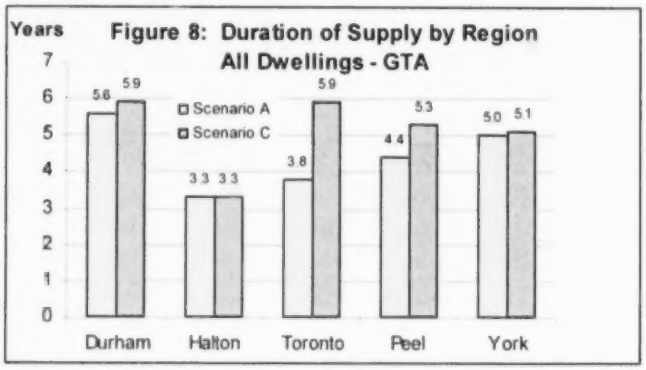
In 2003, there were 71,432 single-detached units in approved development plans, an increase of 2,317 units (3.4%) over the number of singles in the 2001 survey. With a drop of 2,253 units, semis experienced a 13.9% decrease from 2001 with a total of 14,014 units in approved development plans. Rows decreased by 2,853 units (10.8%) compared to the 2001 survey, dropping to 23,652 units. The supply of apartments showed a significant gain over the 2001 survey, increasing by 34,139 units (57.9%). With the exception of Durham Region, which saw a decrease of 8,444 units, all regions in the GTA experienced an increase in the total supply of units in approved development plans from 2001 to 2003. Figure 7 below compares the total number of units in approved development plans between 2001 and 2003 for the GTA by house type.



Toronto has about 54% of the GTA's apartment supply. This is followed by Peel Region at 31% of the total apartment supply in the GTA. When it comes to singles, York Region led the way in 2003, with 47% of the GTA's supply. This was followed by Peel (23%) and Durham (18%).

The absorption scenario based on recent building activity (scenario A) reveals that the duration of supply of units in approved development plans for all housing types in the GTA is above the three-year target, at 4.4 years. This supply is slightly below the 2001 survey results, which showed supply at 4.7 years. The greatest supply of units available for residential development was in Durham Region, with an overall supply of 5.6 years. By comparison, Halton Region had the tightest supply, with an estimated 3.3 years of supply of residential units.

The historical trend absorption scenario (scenario C) estimated all regions in the GTA to have more than a 5 year supply of units in approved development plans, with the exception of Halton Region, which is estimated to have 3.3 years of supply for scenarios C (as well as A). Figure 8 below shows the overall duration of supply for each region in the GTA.



Across the GTA, scenario A showed singles at 3.3 years of supply and scenario C at 3.7 years (down slightly compared to 2001); semis were tighter in supply at 2.4 years for scenario A and 2.7 years for scenario C (down slightly from 2001). Rows were also down marginally in 2003 to 3.9 years in duration for scenario A and 3.8 years for scenario C. As in previous years, the supply of apartments in the GTA was well above the three-year provincial target for both scenarios A and C at 7.5 years and 11.3 years, respectively, in 2003. Figure 9 shows the duration of supply in the GTA, by house type.

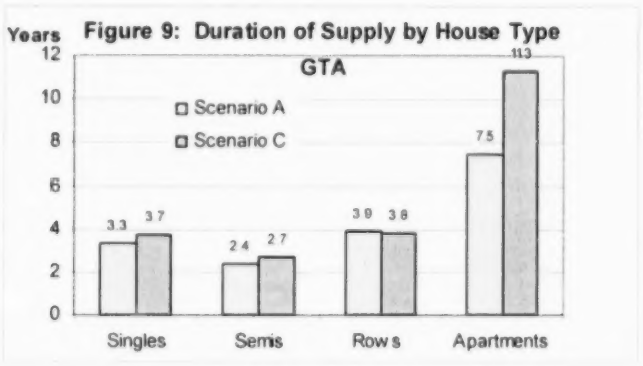


Table 4 below shows the change in the number of units in additional supply between 2001 and 2003. Units in additional supply, beyond those included in approved development plans, totaled 100,655. This represents a 6.3% drop (6,745 units) from 2001. The biggest decreases were found in single and row housing types, with 18.6% and 39% decreases from 2001respectively. This was followed by semis, which decreased by 4.8%. Apartments, which make up 38.7% of units in additional supply, increased by 35% over the 2001 survey.

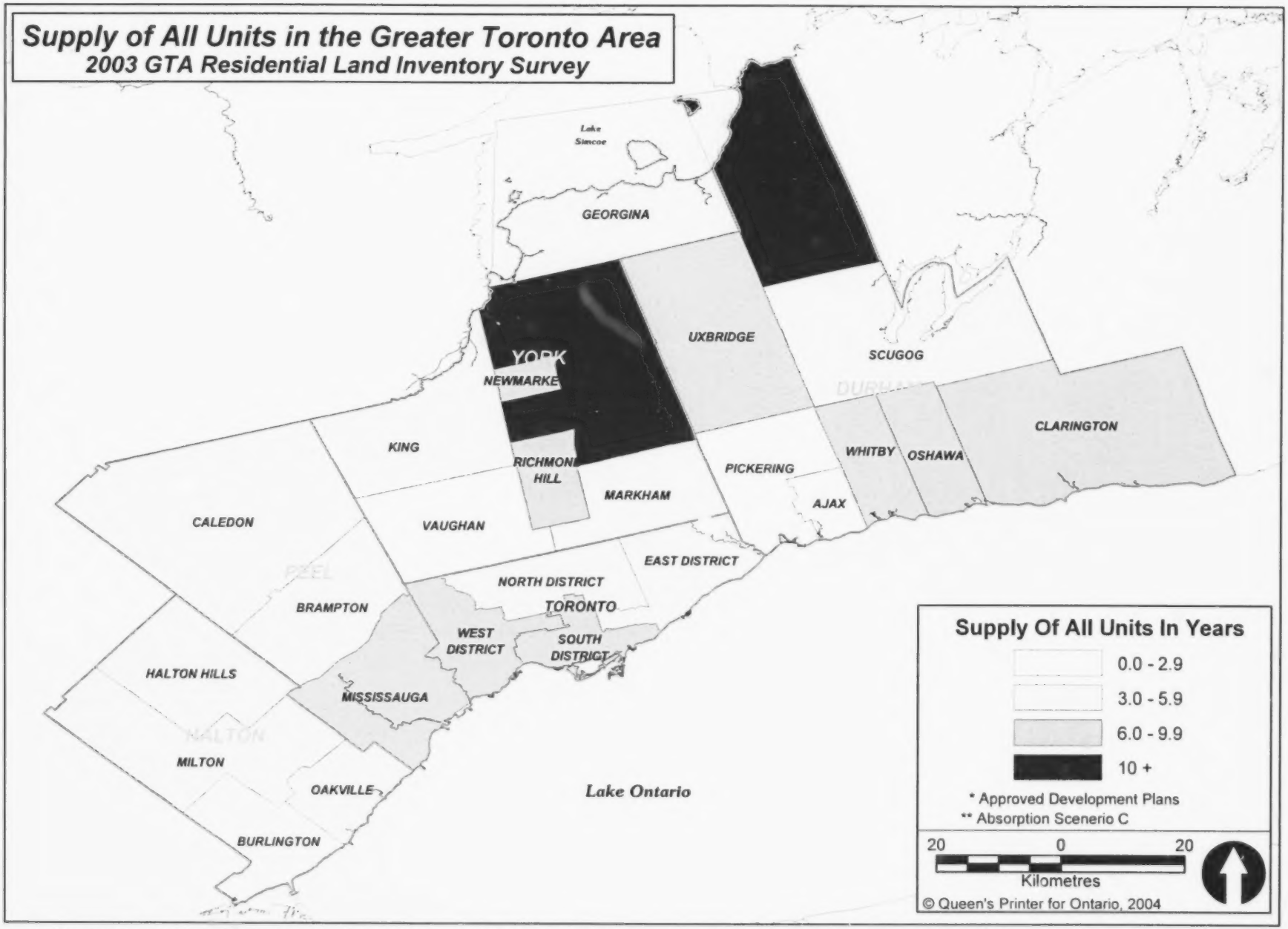
Table 4: GTA Inventory of Units in Additional Supply

House Type	2001	Proportion	2003	Proportion	Net Change	% Change
Singles	54,374	50.6%	44,286	44.0%	-10,088	-18.6%
Semis	7,785	7.2%	7,410	7.4%	-375	-4.8%
Rows	16,365	15.2%	9,981	9.9%	-6,384	-39.0%
Apartments	28,876	26.9%	38,978	38.7%	+10,103	+35.0%
Totals	**107,400**	**100%**	**100,655**	**100%**	**-6,745**	**-6.3%**

While residential construction continues to be strong, the current stock of approved units and additional supply should be able to meet the three-year supply requirement under the Provincial Policy Statement. However, the tightening duration of supply bears close monitoring by municipalities, especially in light of robust home construction that took place throughout 2003. This is particularly important for additional supply, which has seen consistent reductions since the 1997 survey. Table 5 below shows the total inventory of units in additional supply and approved development plans between 1994 and 2003.

Table 5: GTA Inventory of Units 1994-2003

Year	Additional Supply	Approved Development Plans	Total Units in the Development Approval Process
1994	**47,716**	**157,285**	**205,001**
1995	**74,293**	**142,335**	**216,628**
1996	**160,318**	**156,738**	**317,056**
1997	**163,336**	**162,469**	**325,805**
1998	**133,834**	**182,166**	**316,000**
2000	**118,225**	**170,845**	**289,070**
2001	**107,400**	**170,894**	**278,294**
2003	**100,655**	**202,244**	**302,899**



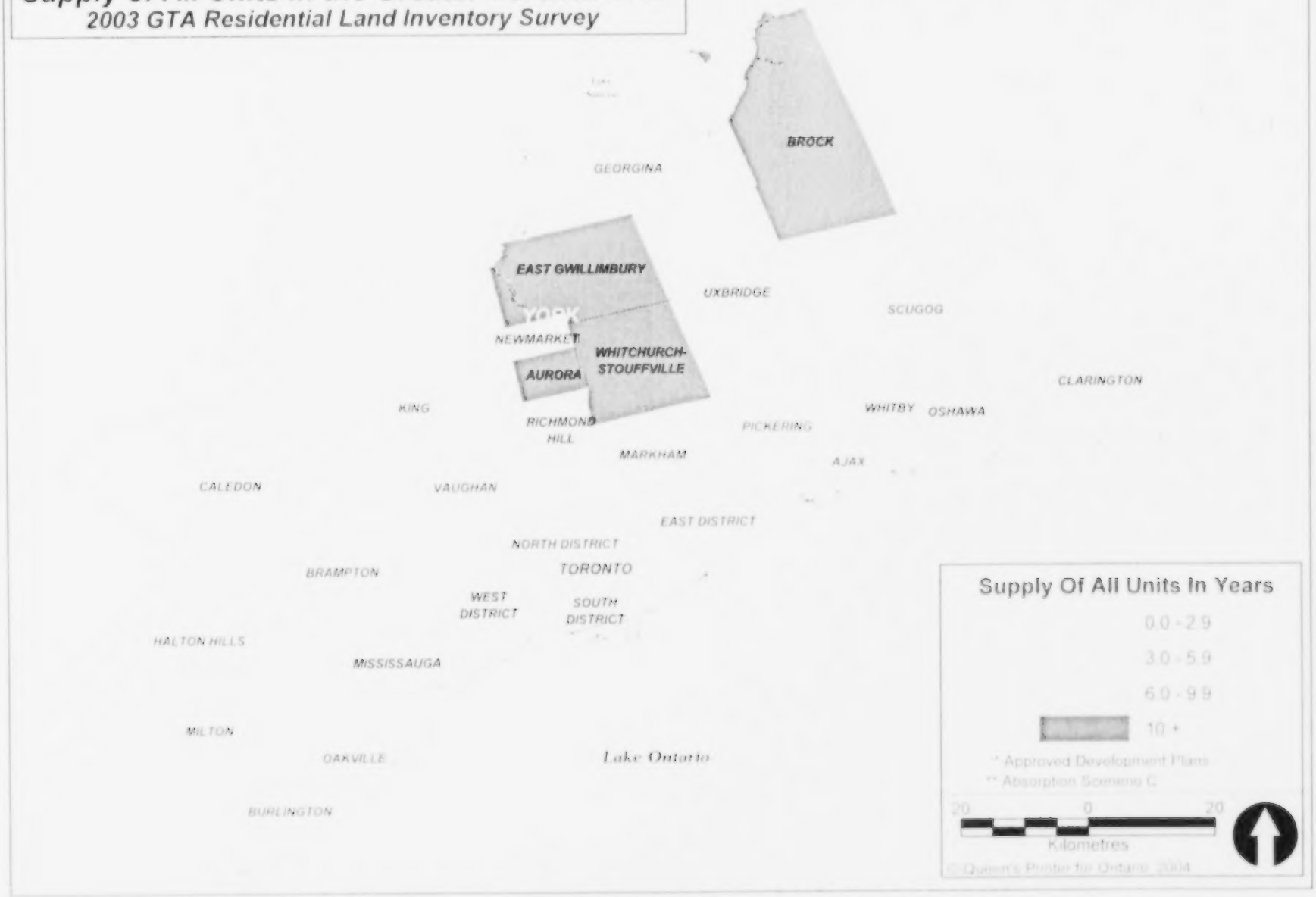
Source: Ontario Ministry of Municipal Affairs & Housing - Provincial Planning and Environmental Services Branch under licence with the Ministry of Natural Resources, 2003

* Approved development plans include units in draft approved and registered plans of subdivision and units in other development plans that are either fully approved or are proceeding through site plans approval.

** Absorption Scenario C is based on a 5-year annual average of building permits issued between 1998 and 2002.

Supply of All Units in the Greater Toronto Area

2003 GTA Residential Land Inventory Survey



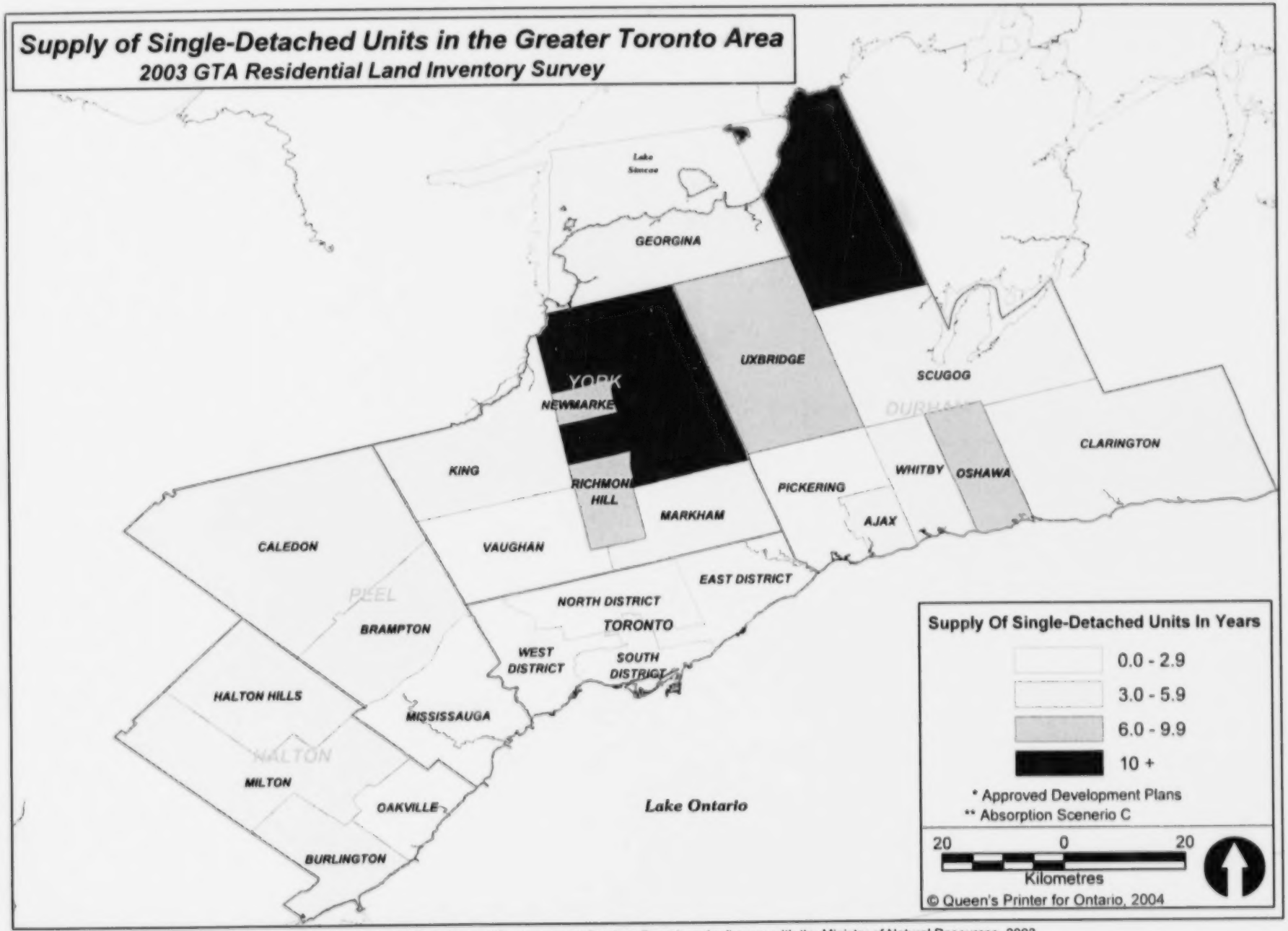
Source: Ontario Ministry of Municipal Affairs & Housing - Provincial Planning and Environmental Services Branch under licence with the Ministry of Natural Resources, 2003.

* Approved lower-tier plans include units in draft approved and registered plans of subdivision and units in other development plans that are either fully approved or are proceeding through site plans approval.

** Absorption Scenario C is based on a 5-year moving average of building permits issued between 1998 and 2002.

Supply of Single-Detached Units in the Greater Toronto Area

2003 GTA Residential Land Inventory Survey



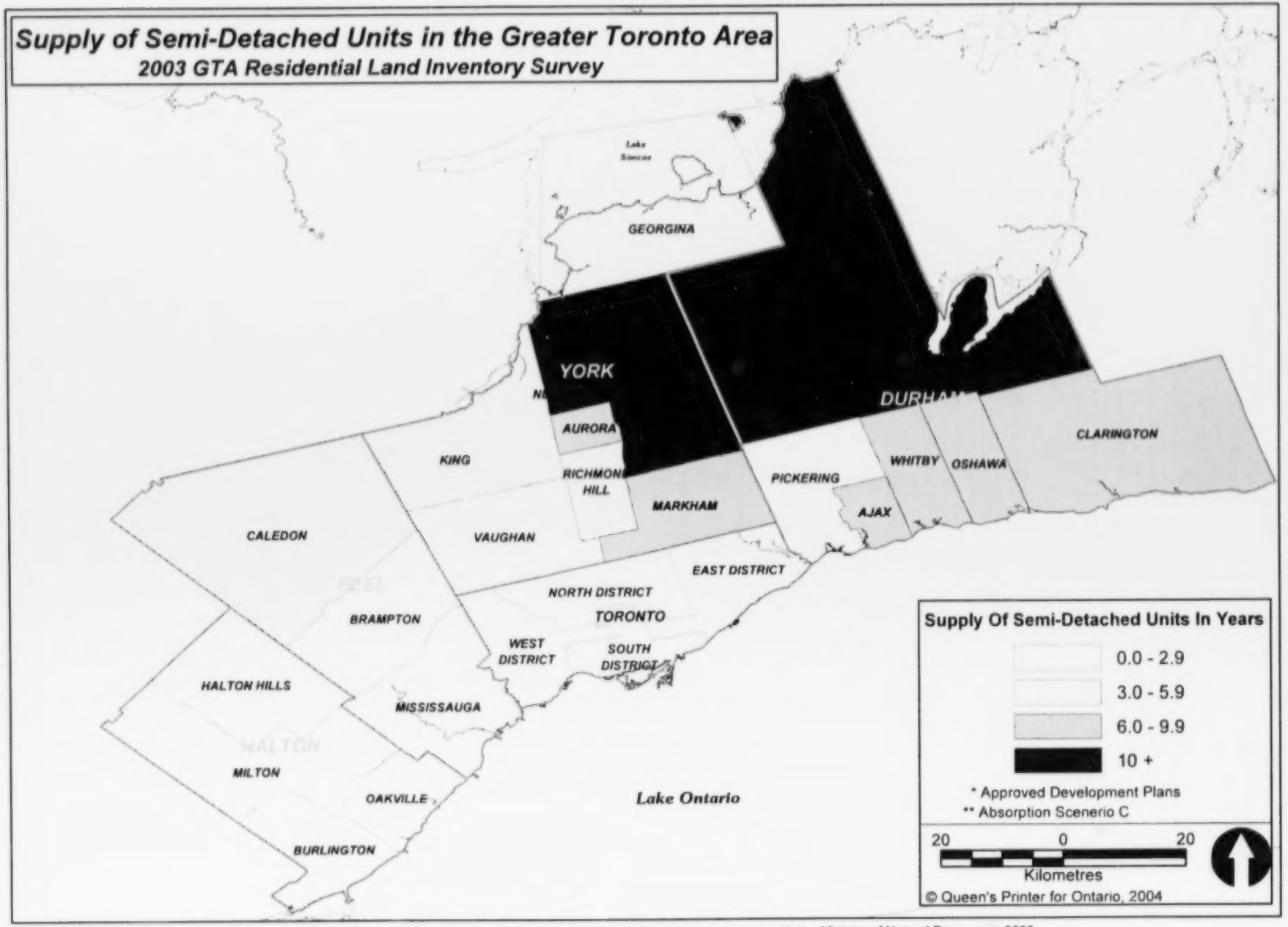
Source: Ontario Ministry of Municipal Affairs & Housing - Provincial Planning and Environmental Services Branch under licence with the Ministry of Natural Resources, 2003

* Approved development plans include units in draft approved and registered plans of subdivision and units in other development plans that are either fully approved or are proceeding through site plans approval.

** Absorption Scenario C is based on a 5-year annual average of building permits issued between 1998 and 2002.

Supply of Semi-Detached Units in the Greater Toronto Area

2003 GTA Residential Land Inventory Survey



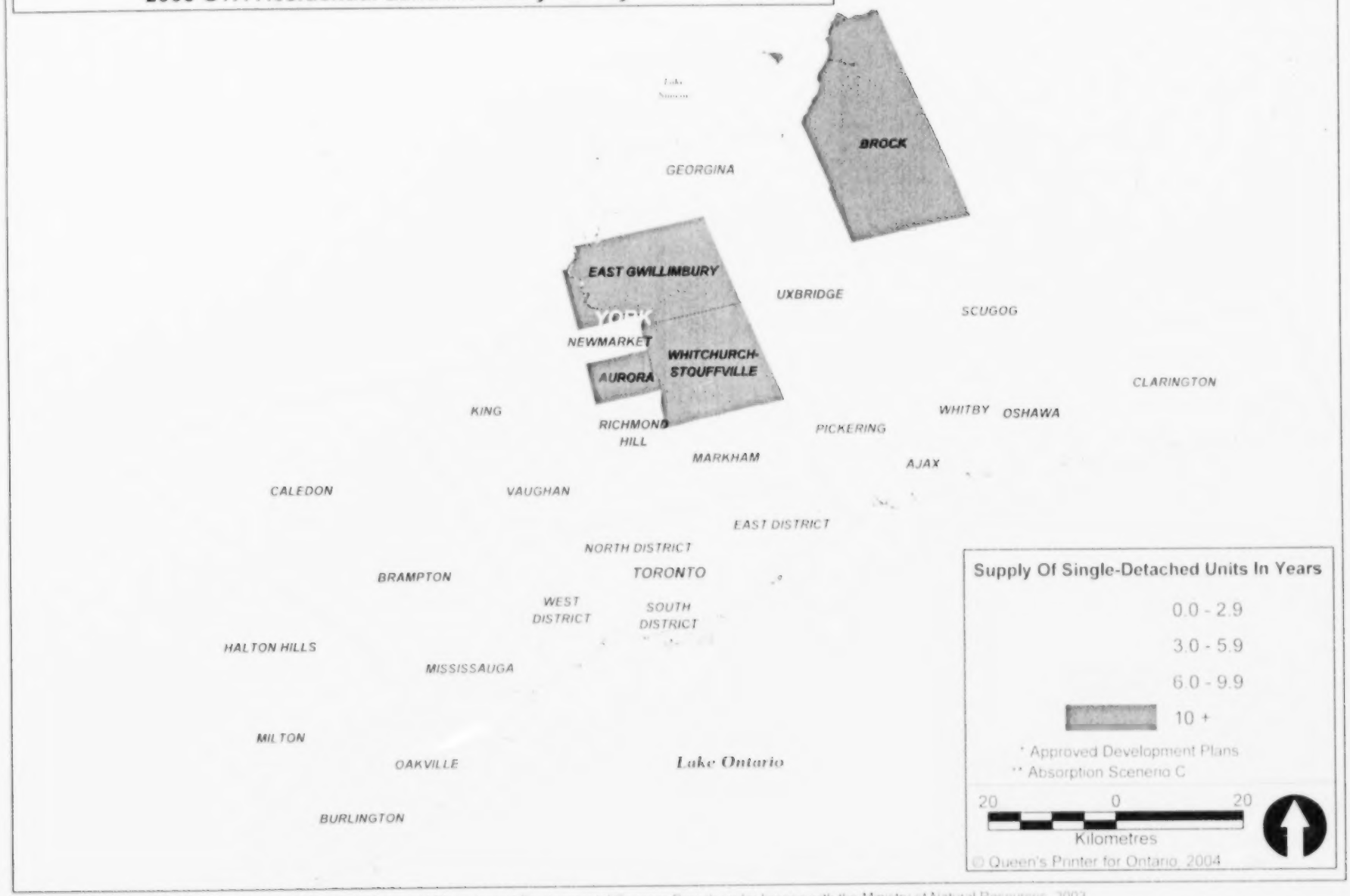
Source: Ontario Ministry of Municipal Affairs & Housing - Provincial Planning and Environmental Services Branch under licence with the Ministry of Natural Resources, 2003

* Approved development plans include units in draft approved and registered plans of subdivision and units in other development plans that are either fully approved or are proceeding through site plans approval.

** Absorption Scenario C is based on a 5-year annual average of building permits issued between 1998 and 2002.

Supply of Single-Detached Units in the Greater Toronto Area

2003 GTA Residential Land Inventory Survey



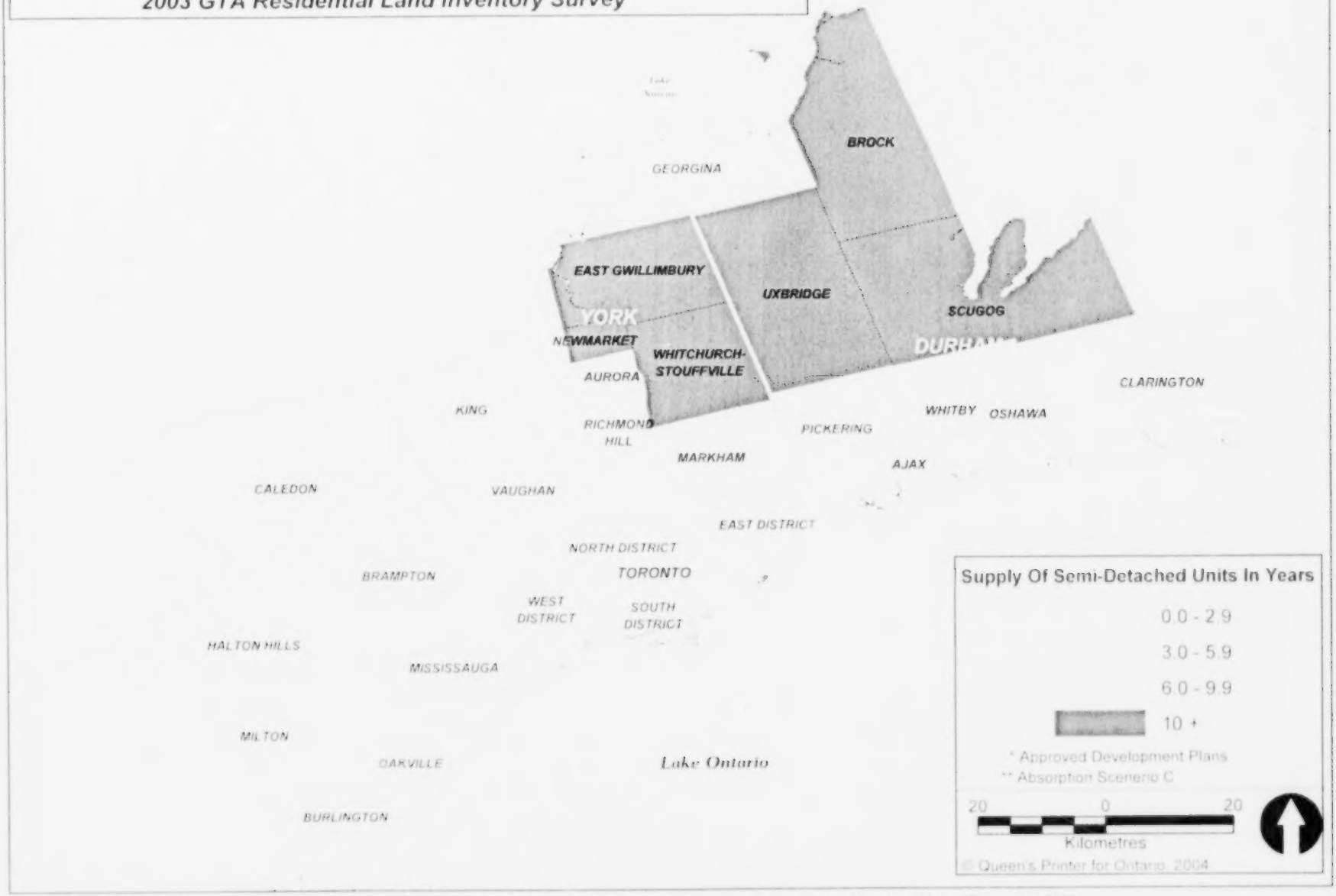
Source: Ontario Ministry of Municipal Affairs & Housing - Provincial Planning and Environmental Services Branch under licence with the Ministry of Natural Resources, 2003.

* Approved development plans include units in draft approved and registered plans of subdivision and units in other development plans that are either fully approved or are proceeding through site plans approval.

** Absorption Scenario C is based on a 5-year annual average of building permits issued between 1998 and 2002.

Supply of Semi-Detached Units in the Greater Toronto Area

2003 GTA Residential Land Inventory Survey



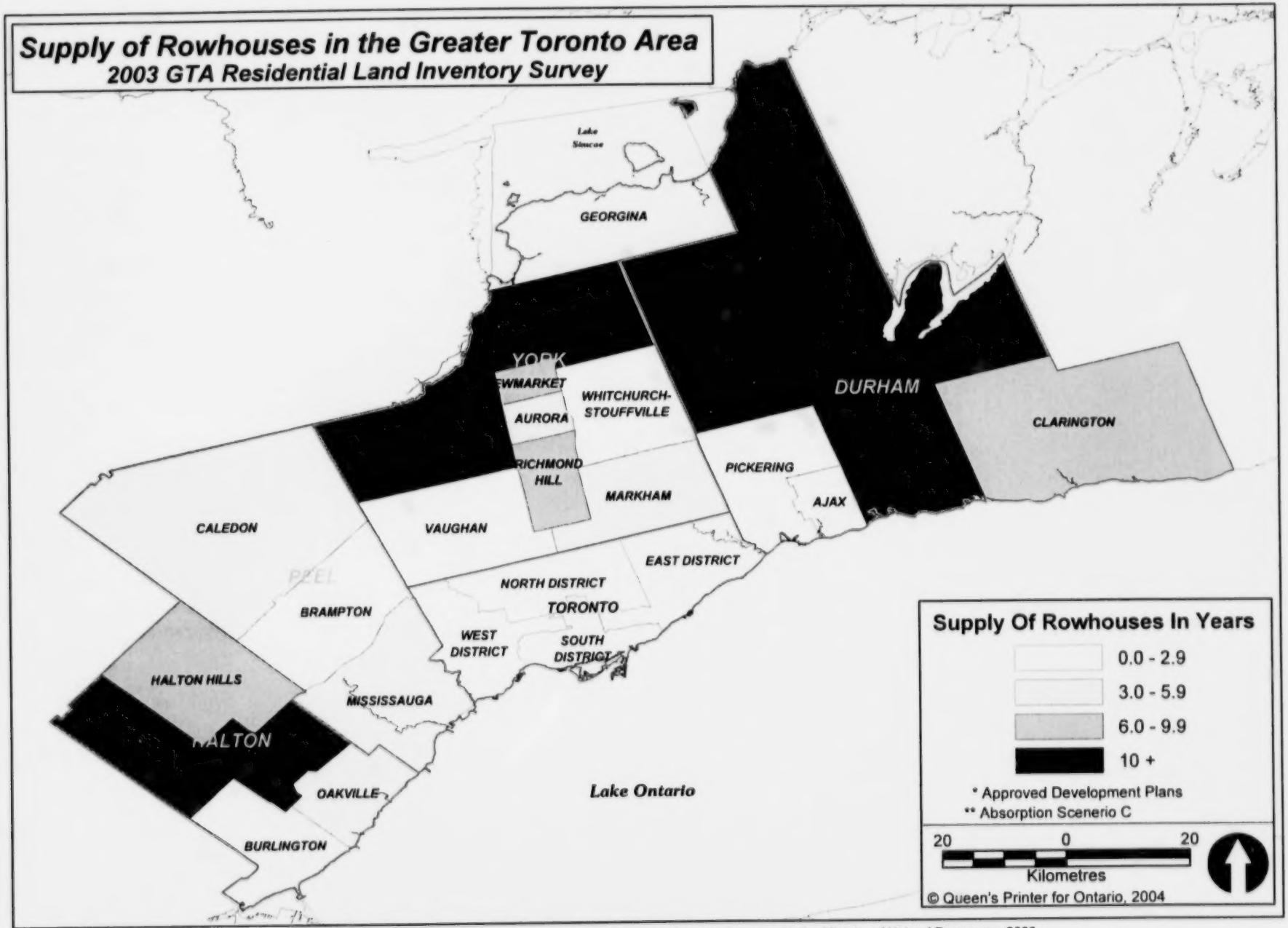
Source: Ontario Ministry of Municipal Affairs & Housing - Provincial Planning and Environmental Services Branch under licence with the Ministry of Natural Resources, 2003.

* Approved development plans include units in draft approved and registered plans of subdivision and units in other development plans that are either fully approved or are proceeding through site plans approval.

** Absorption Scenario C is based on a 5-year annual average of building permits issued between 1998 and 2002.

Supply of Rowhouses in the Greater Toronto Area

2003 GTA Residential Land Inventory Survey

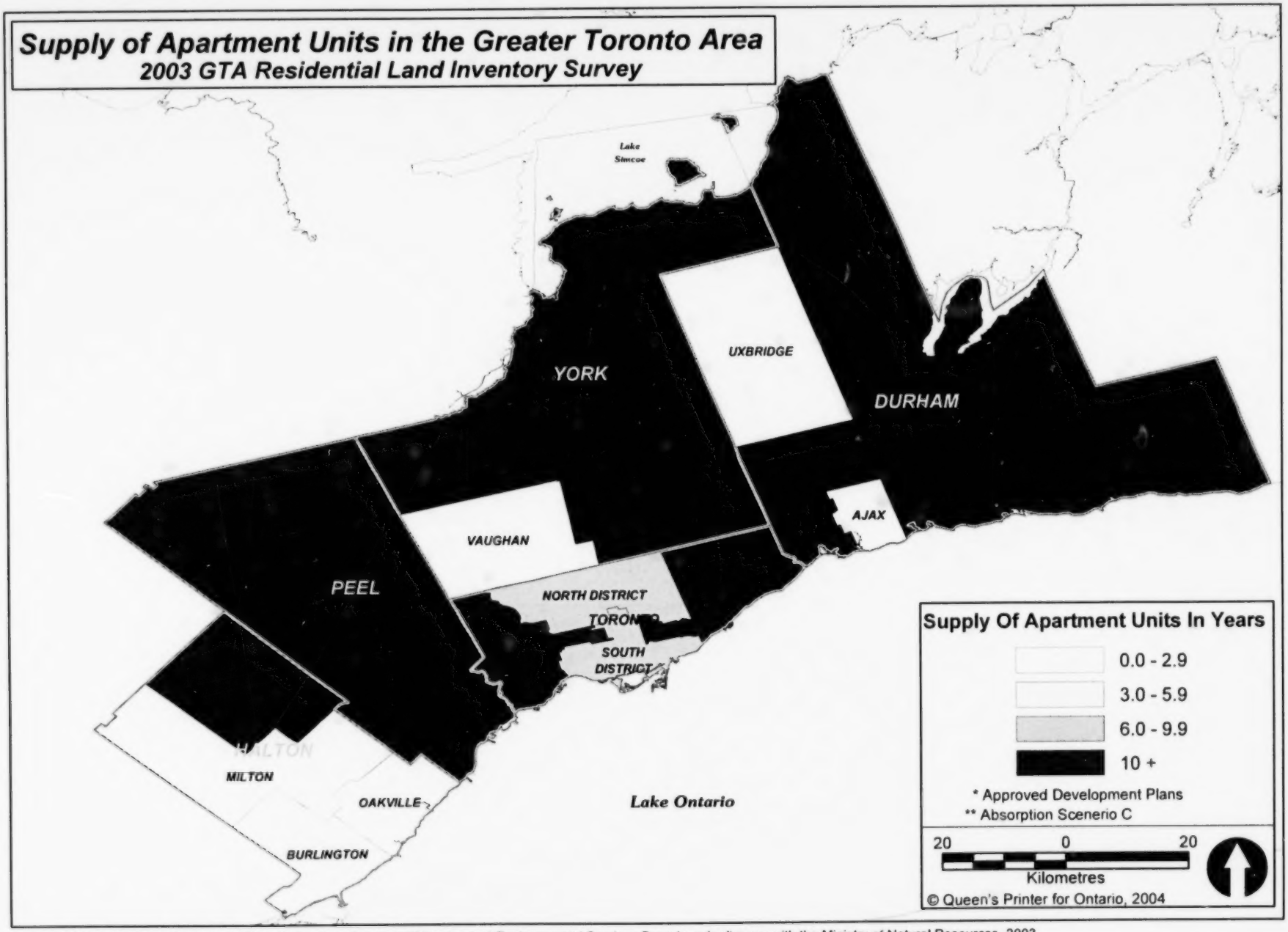


Source: Ontario Ministry of Municipal Affairs & Housing - Provincial Planning and Environmental Services Branch under licence with the Ministry of Natural Resources, 2003

* Approved development plans include units in draft approved and registered plans of subdivision and units in other development plans that are either fully approved or are proceeding through site plans approval.

** Absorption Scenario C is based on a 5-year annual average of building permits issued between 1998 and 2002.

Supply of Apartment Units in the Greater Toronto Area
2003 GTA Residential Land Inventory Survey



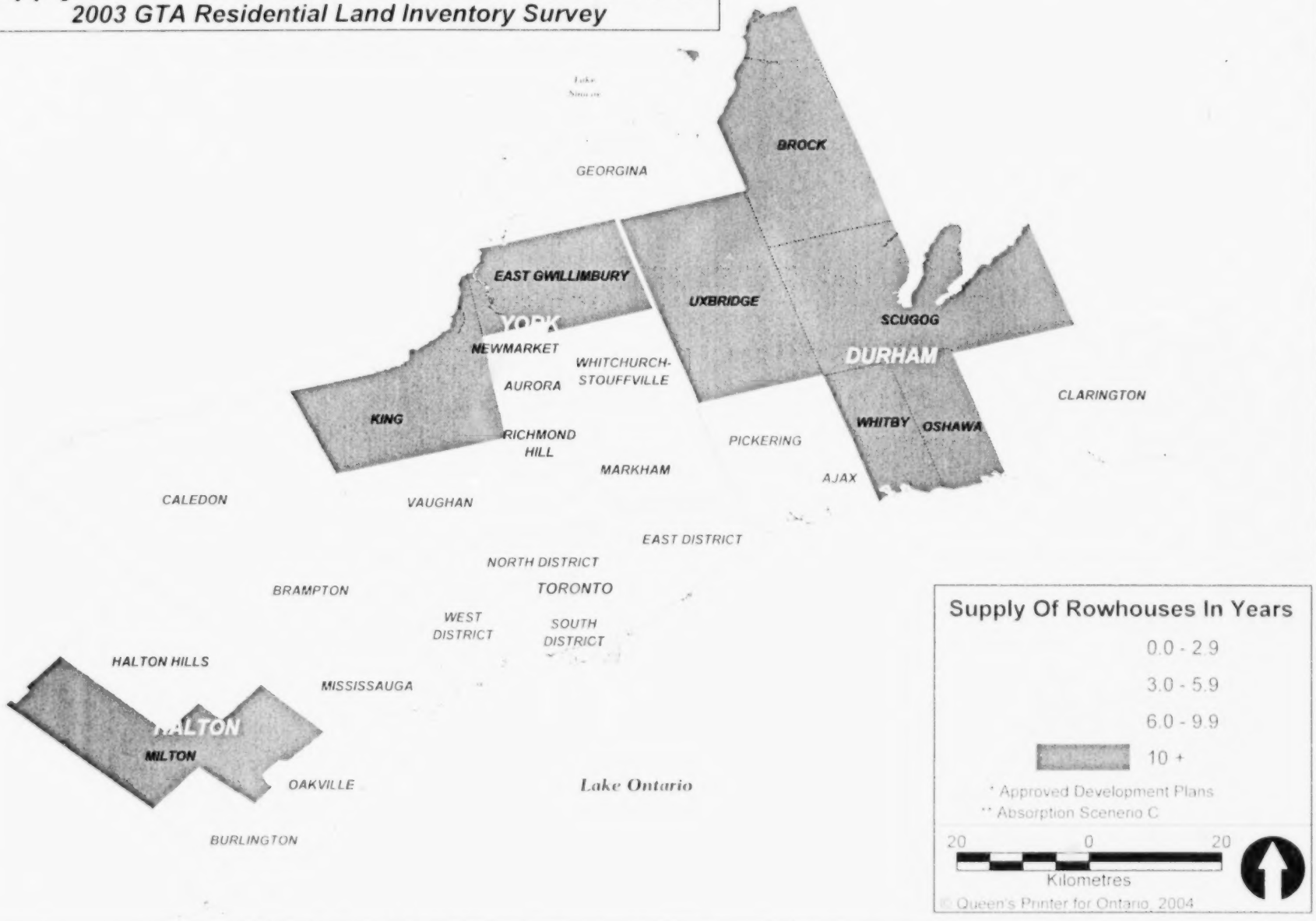
Source: Ontario Ministry of Municipal Affairs & Housing - Provincial Planning and Environmental Services Branch under licence with the Ministry of Natural Resources, 2003

* Approved development plans include units in draft approved and registered plans of subdivision and units in other development plans that are either fully approved or are proceeding through site plans approval.

** Absorption Scenario C is based on a 5-year annual average of building permits issued between 1998 and 2002.

Supply of Rowhouses in the Greater Toronto Area

2003 GTA Residential Land Inventory Survey



Source: Ontario Ministry of Municipal Affairs & Housing - Provincial Planning and Environmental Services Branch under licence with the Ministry of Natural Resources, 2003.

* Approved development plans include units in draft approved and registered plans of subdivision and units in other development plans that are either fully approved or are proceeding through site plans approval.

** Absorption Scenario C is based on a 5-year annual average of building permits issued between 1998 and 2002.

Supply of Apartment Units in the Greater Toronto Area

2003 GTA Residential Land Inventory Survey

Source: Ontario Ministry of Municipal Affairs & Housing - Provincial Planning and Environmental Services Branch under licence with the Ministry of Natural Resources, 2003.

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** Absorption Scenario C is based on a 5-year annual average of building permits issued between 1998 and 2002.

DURHAM REGION

According to the 2003 survey, the total number of units in Durham Region's approved development plans decreased by 8,444 units (26.4%) from 2001, the only Region in the GTA to have experienced a decrease. Looking at changes in each unit type, singles decreased by 28.9%, rows by 34.4% and apartments by 36.9%. Semis, on the other hand, increased by 24.8%.

The largest supply of units in Durham Region continues to consist of singles class, representing 55.6% of total supply. This is marginally lower than the 2001 survey when singles comprised 58% of total supply. Durham Region's supply of singles makes up a little over 18% of the total supply of singles in the GTA. This supply is the third largest (York and Peel region comprise 47% and 23% of the GTA's singles supply, respectively) in terms of its relative importance in the GTA's overall unit inventory. There is also an ample supply of semis and rows, respectively representing 14.9% and 15.4% of Durham's total supply.

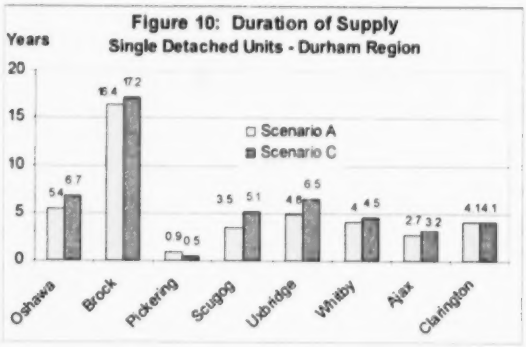
Ajax experienced the largest decrease in its supply of residential units available for development of all area municipalities in the Region. Supply of all housing types in Ajax dropped in 2003, with semis and rows showing the largest decreases, by 79.1% and 70.2%, respectively, followed by singles with a decrease of 36%. Overall, Ajax's total supply of units in approved development plans decreased by 48.2% or 1,908 units. In contrast, however, is the significant portion of units in additional supply within Ajax, which holds 54% of the Region's units in additional supply.

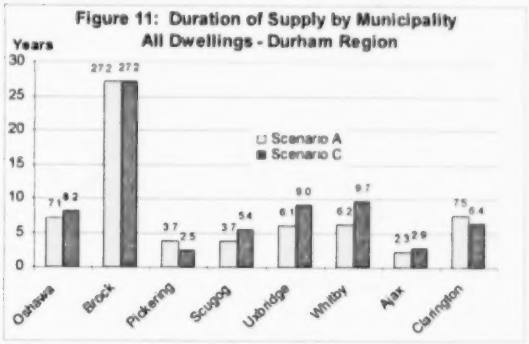
Pickering and Oshawa also saw significant decreases in total supply, falling by 34% and 30.1%, respectively. Uxbridge, on the other hand, was the only municipality to experience an increase in total supply, by 474 units or 94.2%. In the singles category, Pickering showed the largest decrease, falling by 58.6%.

The duration of supply overall in Durham Region dropped from 2001. The absorption scenario based on recent building activity (scenario A) revealed duration of supply in the Region at 5.6 years in 2003, compared to 7.4 years in 2001. The supply for singles was down from 2001, at 4.0 years. Supply duration for rows was also down slightly, to 10.0 years. The duration of supply for semis, which saw an increase of 699 units, increased to 7.2 years in 2003 from 5.2 years in 2001. The supply for apartments also increased significantly, to 43.3 years despite a drop of almost 37% in this housing category.

The historical trend absorption scenario (scenario C) showed supply in the Region to be above the provincial three-year target, although shorter in duration compared to 2001. In 2003, there were 5.9 years of supply overall, compared to 8.8 years in 2001. As with the supply for singles and rows for scenario A, the duration of supply for scenario C was also down from 2001, at 4.5 years for singles and 8.1 years for rows, down from 7.2 and 11.6 years, respectively.

Scenario C, however, shows the supply for semis up to 7.6 years. In contrast to duration of supply for scenario A, scenario C estimated duration of supply for apartments fell nearly 10 years in 2003, to 24.9 years. Figure 10 below shows the duration of supply for single-detached units for each municipality in Durham Region. Figure 11 shows the duration of supply for all units by Municipality.





The drop in the total number of units in Ajax, has resulted in a significant drop in its duration of supply. Ajax is the only area municipality in Durham Region that does not meet the provincial three-year target for both scenarios A and C at 2.3 and 2.9 years overall, respectively, down from between 6.1 and 6.6 years, respectively in 2001.

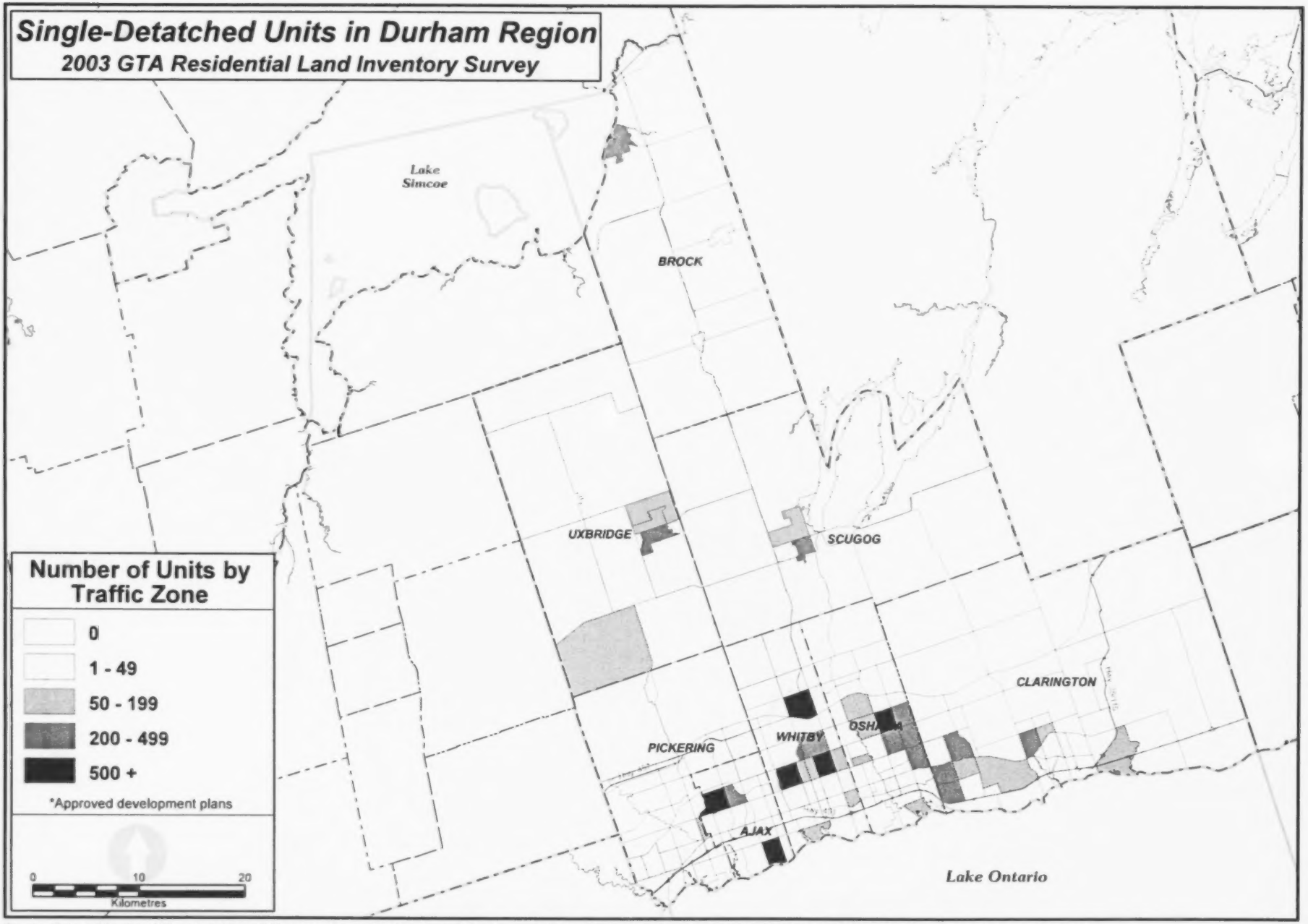
Oshawa and Scugog also saw their overall supplies drop significantly, both for scenarios A and C. Duration of supply for Oshawa dropped from 12.1 years for scenario A and 13.7 years for scenario C in 2001 to 7.1 and 8.2 years, respectively in 2003. A large part of this drop was in the semis category, which dropped to 3.6 years for scenario A from over 50 years in 2001. Scenario C revealed supply for semis fell to 8.3 years in 2003 from 14.4 years in 2001. In Scugog, overall duration of supply fell from 6.1 years in 2001 to 3.7 years in 2003 for scenario A, and to 5.4 years for scenario C, down from 9.4 years in 2001.

As in 2001, the supply of units in Pickering remains well below the three-year target for all housing types with the exception of apartments. Overall supply duration in Pickering, however, is slightly up from 2001 for scenario A to 3.7 years in 2003, compared to 2.9 years in 2001. For scenario C, however, overall duration of supply of residential units fell slightly to 2.5 years in 2003 from 2.6 years in 2001.

Whitby remains the predominant source of supply of residential units overall in Durham Region, accounting for 38% of the Region's total supply, despite dropping by almost 26% from 2001. Oshawa, and Clarington have the second largest sources of residential unit supply at 20.3% and 19.1% of the Regional total, respectively. As in 2001, Whitby remains the leader in the supply of singles, accounting for 33.5% of the Region's supply.

Table 6: Inventory of Units in Additional Supply – Durham Region						
House Type	**2001**	**Proportion**	**2003**	**Proportion**	**Net Change**	**% Change**
Singles	4,800	55.8%	7,162	68.2%	+2,362	+49.2%
Semis	1,153	13.4%	795	7.6%	-358	-31.0%
Rows	1,807	21.0%	1,194	11.4%	-613	-33.9%
Apartments	848	9.9%	1,349	12.8%	+501	59.1%
Total	**8,608**	**100%**	**10,500**	**100%**	**+1,892**	**+22.0%**

Looking towards additional supply, Durham Region witnessed an increase of 22% in the overall supply of units at this earlier stage (1,892 units), when the 2001 and 2003 survey results are compared. This was comprised of a 49.2% increase in singles and a 59.1% increase in apartment units. Table 6 above shows the change in the number of units in additional supply between 2001 and 2003.



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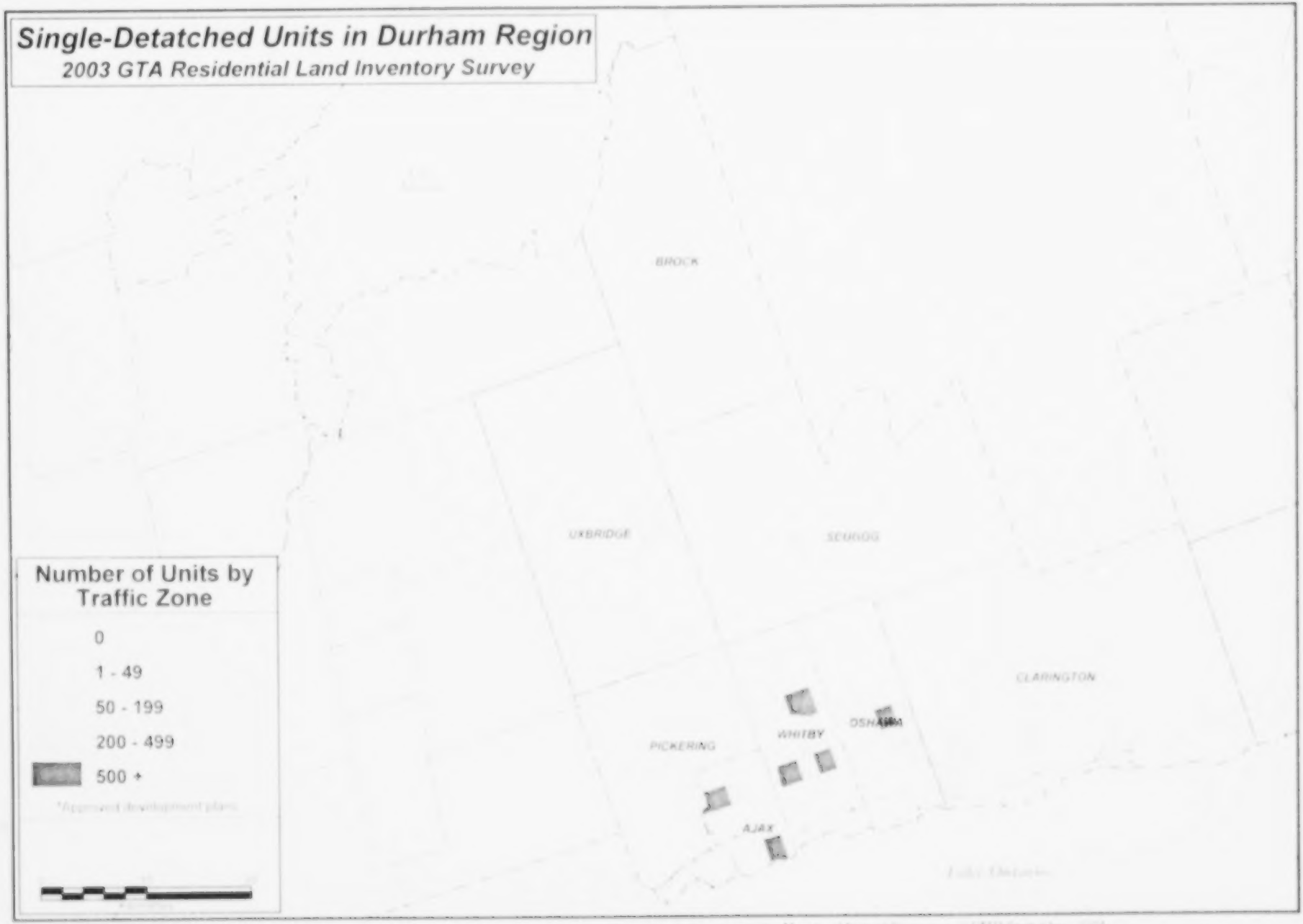
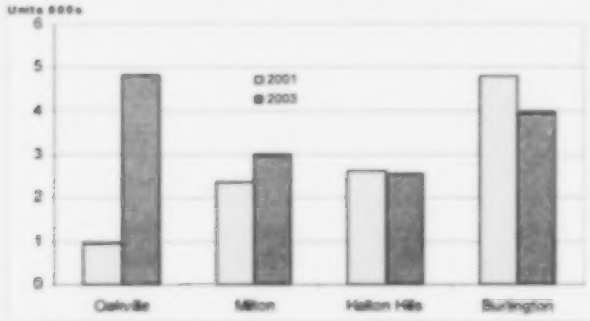

Single-Detatched Units in Durham Region
2003 GTA Residential Land Inventory Survey
BROCK
UXBRIDGE
SCUGOG
CLARINGTON
PICKERING
WHITBY
OSHAWA
AJAX
Number of Units by Traffic Zone
0
1 - 49
50 - 199
200 - 499
500 +
*Approved development plans

HALTON

Halton Region continues to make up the smallest proportion of the supply of units in the GTA, at just over 7% of the total number of units in approved development plans. Oakville accounts for just over one-third of all development activity in the Region. This is followed by Burlington at 27.6% and Milton at 21%. The biggest change between the 2001 and 2003 surveys occurred in Oakville, which increased its total supply of units in approved development plans by 3,884 units, largely as a result of an increase in the number of single-detached units. Significant increases were evident for all housing types except apartments, which experienced a decrease. Similar to the 2001 inventory, single detached units account for over one-half (55.3%) of all units in approved development plans in Halton Region. Figure 12 below compares the total number of units in approved development plans between 2001 and 2003 by municipality.

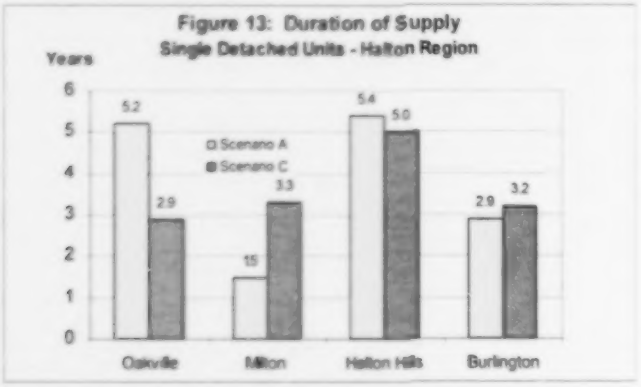
Figure 12: Total Units in Approved Development Plans by Municipality - Halton Region



In contrast to the 2001 survey, the duration of supply for all unit types across Halton Region meets the three-year provincial target in 2003 for both the absorption scenario based on recent building activity (scenario A) and the historical trend absorption scenario (scenario C), with the exception of semis, which was at 0.9 years and 1.3 years, respectively. The supply of apartment units was just under the three-year target for scenario C only, at 2.6 years. Duration of supply for singles stood at 3.4 years for both scenarios A and C, up slightly from 2001. Rows were also up slightly in 2003, at 3.5 and 4.0 years for scenario A and scenario C, respectively. While total supply for the Region increased by 3,651 units from 10,721 in the 2001 survey, duration of supply edged up only slightly to 3.3 years from 2.4 years for scenario A and from 3.0 years to 3.3 years for scenario C.

The large infusion of new units in approved development plans in Oakville saw its overall supply duration increase significantly for both scenarios A and C to 3.9 and 3.0 years, respectively. Comparable figures for 2001 were 0.6 years for scenario A and 0.7 years for scenario C. This was led by significant increases in the number of singles and row houses. Oakville's duration of supply for singles

stood at 5.2 years for scenario A and 2.9 years for scenario C, compared to 0.6 and 0.7 years, respectively, in 2001. Row houses were at 3.7 and 4.3 years of supply for scenario A and scenario C in 2003, up from 0.7 and 0.8 years in 2001, respectively. Figure 13 shows the duration of supply for single-detached units for each municipality in Halton Region.



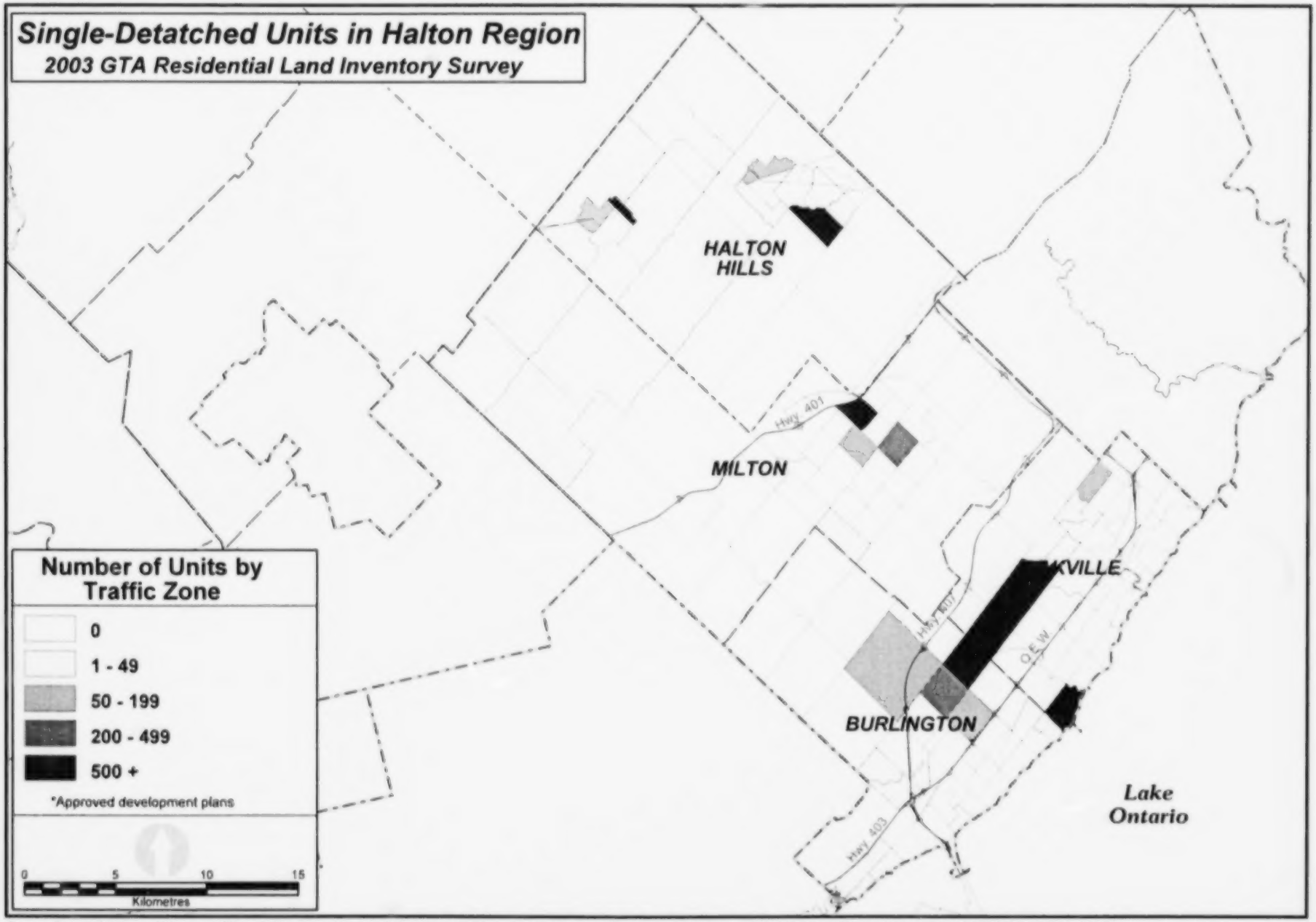
Increased absorption rates for Milton resulted in significant decreases in years of supply for all housing types except apartments, for which no building permits were issued in the last two years. For scenario A, singles fell from 14.7 years in 2001 to 1.5 years in 2003, and for scenario C from 25.4 years in 2001 to 3.3 years in 2003. Semis dropped to 0.8 years in 2003 from 38.8 years in 2001 for scenario A, and to 2.0 years in 2003 from over 50 years in 2001 for scenario C. Rows were also down to 6.3 years from 9.8 years in 2001 for scenario A, and to 13.9 years in 2003, down from 25.6 years in 2001 for scenario C. As noted in the 2001 survey, these decreases in supply durations were expected, due to the removal of severe servicing constraints in 2001.

Overall duration of supply for Halton Hills was up in 2003 to 6.3 years for scenario A and 5.2 years for scenario C. This was primarily led by increases in the duration of supply for singles and rows. Singles were up to 5.4 years for scenario A and 5.0 years for scenario C. Comparable figures for 2001 were 3.2 and 4.1 years, respectively. Scenario A shows rows up in 2003 to 16.8 years from 4.8 in 2001, but down for scenario C to 6.2 years from 9.3 years in 2001.

For Burlington, overall duration of supply edged up only slightly to 3.0 years for scenario A. For scenario C, however, the duration of supply for Burlington is weakest among Halton Region municipalities, at 2.4 years, down slightly from 2001. This was led by singles, which dropped from 5.3 years in 2001 to 3.2 years in 2003. In contrast to 2001, the supply of apartments units rose above the provincial target, for scenario A only, to 9.1 years. However, the supply of apartments remained below the three year target for scenario C, at 2.8 years in 2003, although the duration was up slightly from 2001.

Table 7: Inventory of Units in Additional Supply – Halton Region						
House Type	**2001**	**Proportion**	**2003**	**Proportion**	**Net Change**	**% Change**
Singles	11,147	61.4%	6,381	57.5%	-4,766	-42.8%
Semis	1,202	6.6%	186	1.7%	-1,016	-84.5%
Rows	3,259	18.0%	1,631	14.7%	-1,628	-50.0%
Apartments	2,536	14.0%	2,896	26.1%	+361	+14.2%
Total	**18,144**	**100%**	**11,094**	**100%**	**-7,049**	**-38.9%**

Table 7 above shows the change in the number of units in additional supply between 2001 and 2003. The table illustrates the potential impact of additional supply on development in Halton Region, with the additional supply of singles more than doubling the total supply of all other forms. The proportion of semis decreased in 2003 to just under 2% from over 6% in 2001. Apartments, on the other hand, increased their proportion of additional supply from 14% in 2001 to just over 26% in 2003.



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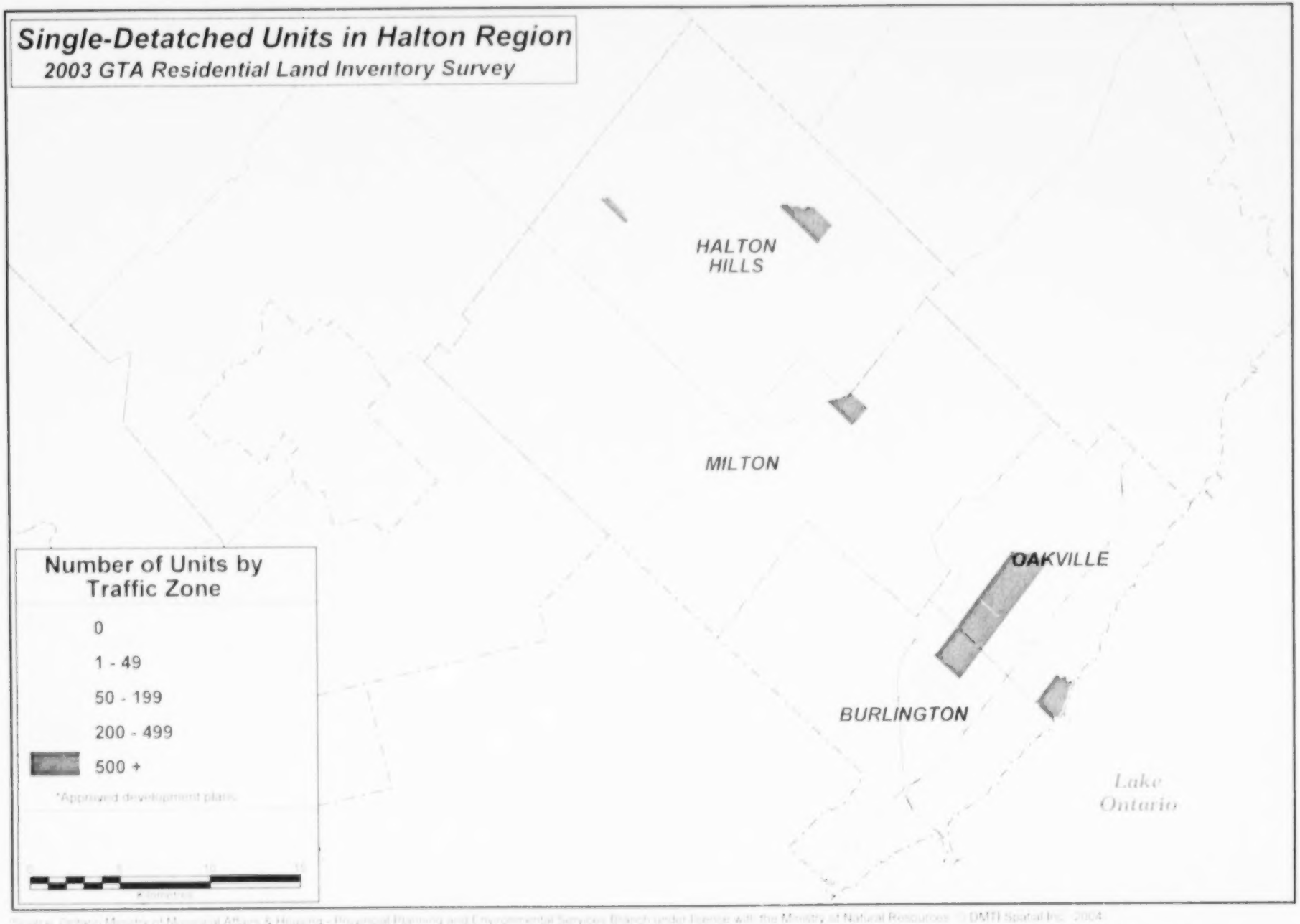

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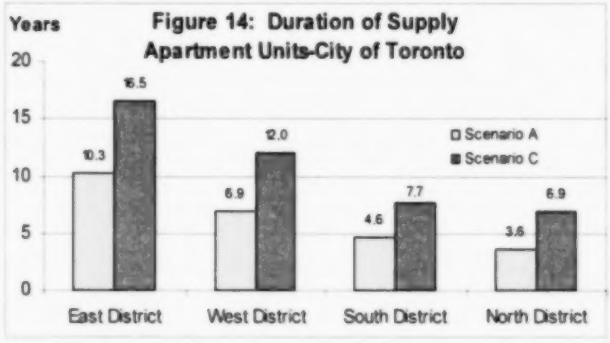
TORONTO

The overall story for Toronto in 2003 is about the supply of apartment units. As in previous years, apartments represent the majority (98%) of housing units in approved development plans. In the 2003 survey, there were 50,577 apartment units in approved development plans in the City of Toronto, up from 25,905 units in 2001. This pushed up overall supply by about 75%, from 29,459 units in 2001 to 51,569 units in the 2003 survey. The absorption scenario based on recent building activity (scenario A) revealed overall duration of supply for the City at 3.8 years in 2003, down from 5.7 years in 2001, while the historical trend absorption scenario (scenario C) indicated duration of supply at 5.9 years compared to 5.1 years in 2001.

All districts of the City experienced significant increases in their supply of apartment units, led by the West District, which had over a 10-fold increase, from 564 units in 2001 to 6,348 units in 2003. This increase pushed up duration of apartment supply in the West District well above the provincial target, to 6.9 years for scenario A and 12.0 years for scenario C. This is in contrast to 2001 when the West District experienced a reduction in its supply of apartment units, falling under the three-year target for both scenarios. Figure 14 shows the duration of supply for apartment units in the City of Toronto, by District.



In the North District the supply of apartment units also rebounded from a decrease in 2001. In 2003, the North District saw an 87% increase in apartments with 6,828 units added. Despite this increase, duration of supply for apartments in the North District dropped and is tightest in the City, at 3.6 years for scenario A and 6.9 years for scenario C. The East District also saw a year-over-year increase in its supply of apartments with an addition of 1,076 units (an almost 17% increase). The largest apartment supply duration in the City remains in the East District, which had 10.3 years of supply for scenario A and 16.5 years for scenario C.

In the South District, the supply of apartment units almost doubled in 2003, rising to 22,059 units, up from 11,075 units in 2001. This increase in apartment supply comes despite continued strong absorptions of land designated for condominium

development over the last two years. For scenario A, duration of apartment unit supply in the South District is at 4.6 years, while for scenario C, supply is at 7.7 years.

Toronto's condominium market has been the strongest segment of the housing market since 2001. Developers have satisfied the appetite of consumers by launching a significant number of projects in and around the core of the City of Toronto, and along the Yonge Street subway. These are areas deemed more desirable by end users and investors alike due to their proximity to entertainment and transportation facilities. The desirability of residing in such areas has resulted in an increase in the number of potential high density sites deemed suitable for development. Beginning in 2003, however, stronger completions have put downward pressure on rents and prices. Indeed, as of the first quarter of 2003, demand from end users and investors slowed, particularly in core areas. Investors, end users and builders alike have thus considered high density opportunities in other suburban communities.

The supply of rows in the City experienced significant reductions from 2001, dropping over 1,800 units (an 87% reduction). This pushed duration of supply for rows down to 0.3 years for both scenarios A and C. The supply of semis also worsened in the City between 2001 and 2003, dropping by 295 units. Duration of supply for semis in the City also dropped, to 0.5 years for scenario A and 0.7 years for scenario C.

The North District is the area with the tightest supply of all units in approved development plans, with total supply at 3.1 years for scenario A, down from 5.3 years in 2001. Duration of supply for scenario C remains unchanged in 2003 at 5.1 years. For the West District, duration of supply for all units rose above the three-year target in 2003, at 4.7 years for scenario A and 6.5 years for scenario C. Comparable figures for 2001 were at 1.3 and 1.2 years, respectively. The South, and East Districts remained above the short-term provincial residential supply target in 2003, although down from 2001. For the South District, duration of supply for scenario A was at 4.0 years and at 6.6 years for scenario C, down from 6.0 years and 5.7 years, respectively in 2001. For the East District, duration of supply for scenario A was at 4.1 years and for scenario C was at 5.6 years. Comparable figures for 2001 were at 9.0 years and 6.2 years, respectively. Figure 15 shows the overall duration of supply for all units in the City of Toronto, by District.

Figure 15: Duration of Supply By District
All Dwellings - City of Toronto

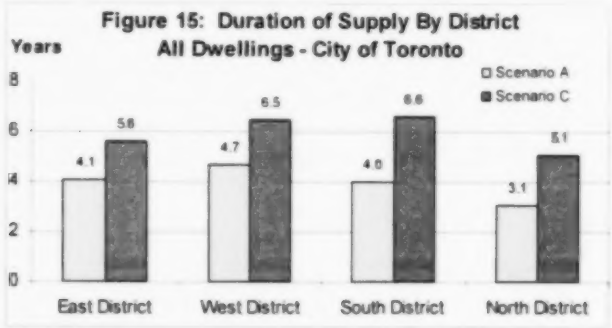
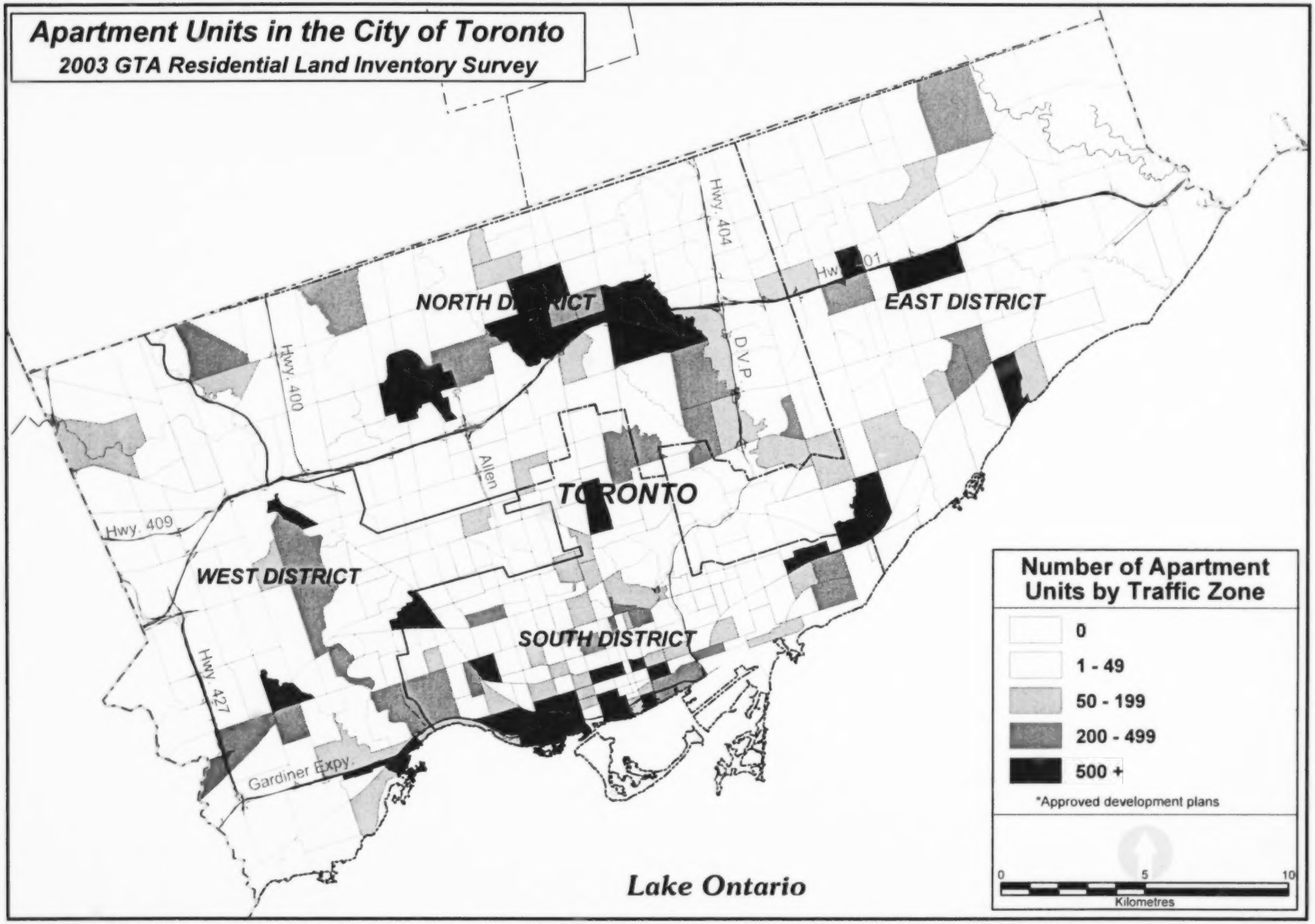


Table 8 below illustrates that apartments make up the greatest proportion of units in the additional supply category. Of greater significance, however, is that the proportion of units in the additional supply category for apartment units more than doubled in 2003, while the proportion of units for other housing types decreased. This perhaps indicates a broader shift towards more dense development in Toronto, reversing trends seen in 2000 and 2001. Toronto's total additional supply stream was up by 9,445 units between 2001 and 2003, over a 55% increase. Singles, which made up almost 19% of additional supply in 2001, fell significantly in 2003 to only 2 units.

Table 8: Inventory of Units in Additional Supply – City of Toronto

House Type	2001	Proportion	2003	Proportion	Net Change	% Change
Singles	3,170	18.7	2	0.0%	-3,168	-99.9%
Semis	392	2.3	87	0.3%	-305	-77.8%
Rows	1,310	7.7	307	1.2%	-1,003	-76.6
Apartments	12,094	71.3	26,015	98.5%	+13,921	115.1%
Total	**16,966**	**100%**	**26,411**	**100%**	**+9,445**	**55.7%**



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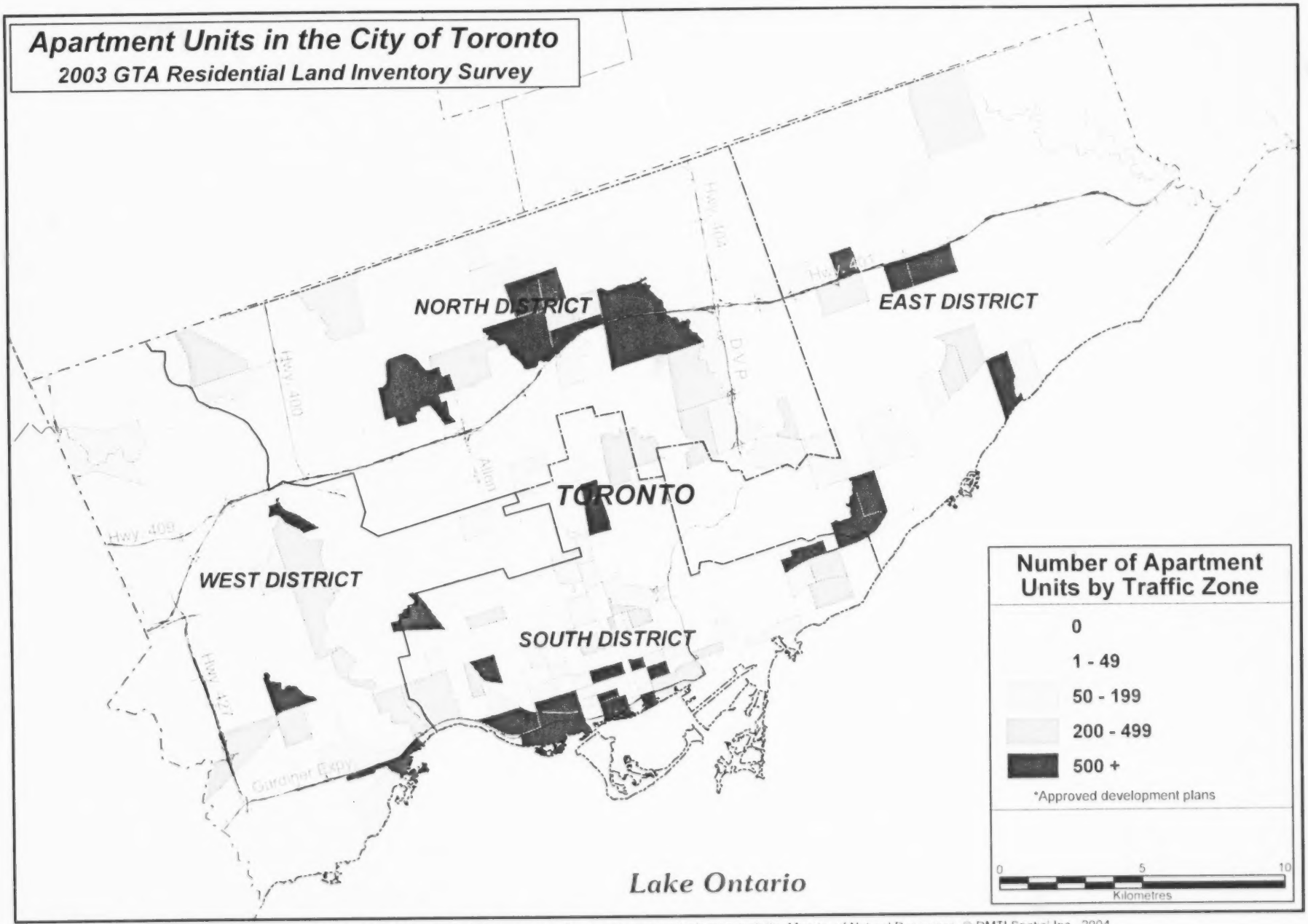

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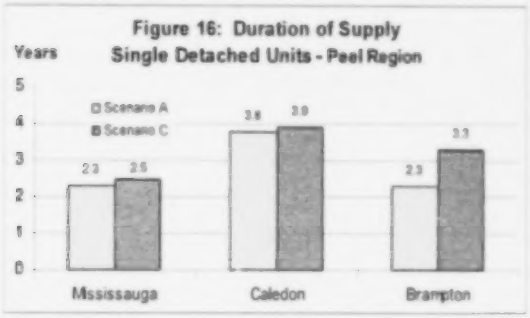
PEEL REGION

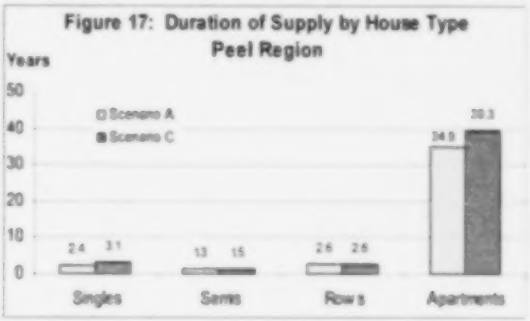
In 2003 Peel Region's supply of units in approved development plans increased from 2001 by just over 1,500 to 52,965 units, largely as a result of an increase in the supply of apartment units. Peel's supply of units in approved development plans is second largest in the GTA. Due to continued strong residential construction activities in the Region, total duration of residential unit supply in Peel tightened in 2003, with about a one year reduction for both the absorption scenarios based on recent building activity (scenario A) and the historical trend absorption scenario (scenario C). The 2003 survey results show duration of supply of units in draft approved and registered plans at 4.4 years for scenario A and 5.3 years for scenario C.

In terms of the area municipalities, Caledon exhibited an overall decrease of 431 units (14%) in total supply, as did Brampton with a decrease of 647 units or almost 5%. Mississauga was the only municipality to improve its supply of units in 2003, with an increase of 7.5% (2,583 units).

As in 2001, apartments continue to make up the greatest proportion of units in approved development plans in Peel at 54.4% in 2003, up from 40.0%, in 2001. The majority of this increase was in Mississauga, which had an increase of 7,881 apartment units, or 41.5% from the 2001 survey, up from 18,985 units. Brampton also experienced a significant increase in its proportion of apartments, up by 30.5% from 2001 to 1,476 units. Duration of supply for apartment units was the only housing type in the Region to be above the provincial target at 34.9 years for scenario A and 39.3 years for scenario C, up slightly from 2001.

Followed by apartments, singles comprise 31.2% (16,527 units) of units in approved development plans in Peel Region. This is down slightly from the 2001 survey, which showed singles at 35% of Peel's approved plans. This pushed the Region's supply for singles in 2003 slightly below the provincial target at 2.4 years for scenario A and 3.1 years for scenario C. Brampton continues to have most of the Region's total supply of singles of the three municipalities in Peel, with 9,694 units. As in Brampton, singles make up the majority of housing types in Caledon at 67.1% of its total supply of units in approved development plans. Caledon is the only municipality in the Region that has a supply of singles above the three-year target for both scenarios A and C at 3.8 and 3.9 years, respectively. Mississauga's supply of singles is tightest in the Region for both scenarios A and C at 2.3 and 2.5 years, respectively. Figure 16 below shows the duration of supply for single-detached units for each municipality in Peel Region. Figure 17 shows the overall duration of supply for all house types in the Region.





Peel's supply for semis and rows had significant decreases in 2003, down by approximately 40% for both housing types. For semis, this pushed duration of supply even further below the three-year target at 1.3 years for scenario A and 1.5 years for scenario C. The majority of this drop in semis was in Mississauga which fell almost 58% (2,142 units) from 2001. Caledon was the only municipality to have an adequate supply of semis at 6.1 years for scenario A and 3.0 years for scenario C.

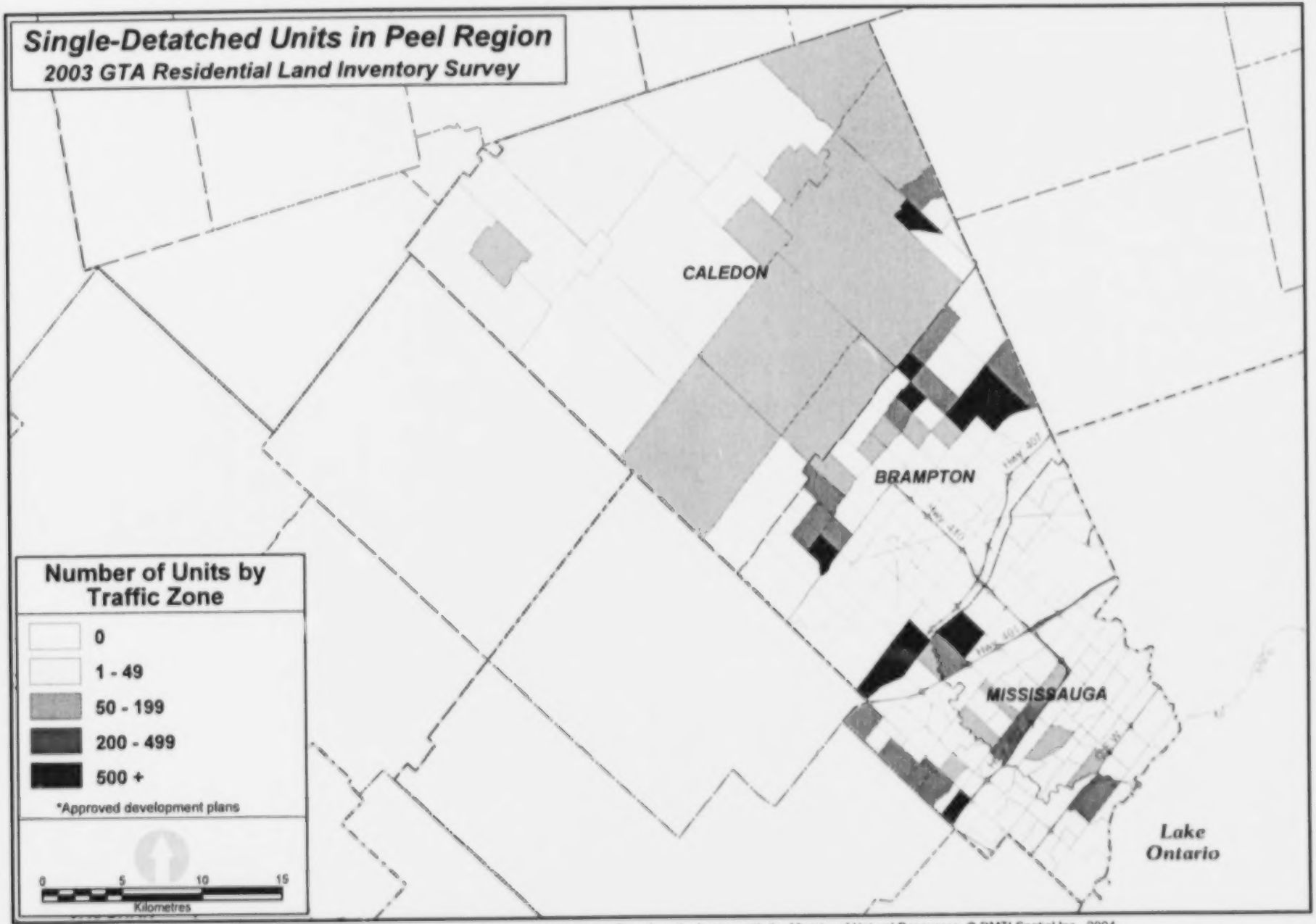
In contrast to 2001, row houses in Peel dipped below the provincial target at 2.6 years for both scenarios A and C. While duration of supply for rows in Mississauga and Brampton was tighter in 2003, Caledon increased its duration of supply for rows to 13.0 years for scenario A and 3.1 years for scenario C, up from 2.7 years and 2.5 years, respectively in 2001.

Overall, Brampton has the tightest duration of supply for all units in Peel Region at 2.4 years for scenario A and 3.2 years for scenario C, down from 3.7 and 4.4 years, respectively in 2001. Mississauga had the largest duration of supply overall in 2003, at 6.4 years for scenario A and 7.0 years for scenario C, although this was down slightly from 2001.

Table 9 below shows the change in the number of units in additional supply between 2001 and 2003. Additional supply in Peel continued to drop in 2003, with a decrease of 10.4 % overall compared to the 2001 survey results, which is in addition to the 5% decrease from 2000. Both singles and semis rebounded in 2003 with increases of 21.2% and 41.7% respectively, while additional supply for rows and apartments dropped by 37.1% and 44.5%, respectively.

Table 9: Inventory of Units in Additional Supply – Peel Region

House Type	2001	Proportion	2003	Proportion	Net Change	% Change
Singles	9,918	36.3%	12,018	49.2%	+2,100	+21.2%
Semis	2,767	10.1%	3,920	16.0%	+1,153	+41.7%
Rows	5,324	19.5%	3,350	13.7%	-1,974	-37.1%
Apartments	9,282	34.0%	5,152	21.1%	-4,130	-44.5%
Total	**27,291**	**100%**	**24,440**	**100%**	**-2,851**	**-10.4%**



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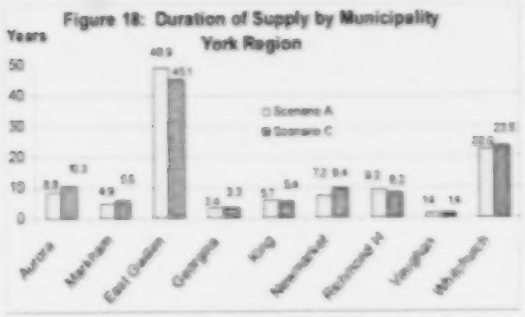
YORK REGION

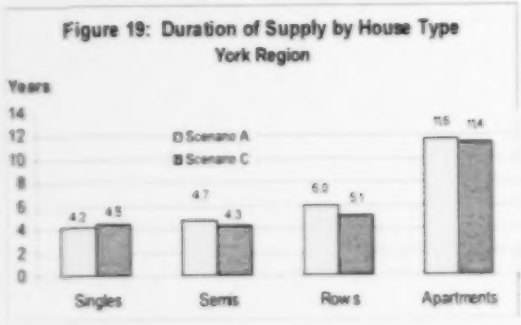
Overall, the supply of units in approved development plans in York Region increased in 2003, by 26.5% compared to the results in the 2001 survey. This represents an increase of just over 12,528 units and can be attributed in large part to the addition of about 8,500 units in Richmond Hill. The increase in Richmond Hill's supply was seen across the board with singles up by 77%, semis increasing by 50%, and rows and apartments up by 16% and 58%, respectively. These increases were in contrast to the decreases in supply seen in Richmond Hill in 2001.

Also of note were increases in the total supply of units in approved development plans in Aurora and Whitchurch-Stouffville, which approximately tripled from 2001. Aurora saw significant increases in single, semi and row housing types, with singles increasing by 213%, semis increasing by 248% and rows increasing by 96%. The most significant increase in Whitchurch-Stouffville was in single-detached units, which increased by 160%.

As in the 2001 survey, at 56%, single-detached dwellings still make up over half of all approved development plans in York Region. The majority of this supply continues to appear in Markham, Vaughan and Richmond Hill, which comprise about 68% of the Region's supply of singles.

York Region continues to meet the three-year target for the supply of residential units available for development in 2003 for the absorption scenario based on recent building activity (scenario A), at 5.0 years. The same is true for the historical trend absorption scenario (scenario C), which estimated duration of supply at 5.1 years. These supply durations are up from the 2001 survey results, which yielded 3.6 years of supply for scenario A and 4.8 years of supply for scenario C. Figure 18 shows the overall duration of supply for each municipality in York Region. Figure 19 show the overall duration of supply by house type.





For both scenarios A and C, an increase in duration of supply from 2001 was evident in all housing categories. For scenario A, in most cases, the increase was upwards of one year. For apartments, duration of supply for the Region almost doubled from the 2001 survey for scenario A, to 11.6 years in 2003.

These increases in duration of supply reverse the downward trend seen since the 2000 survey.

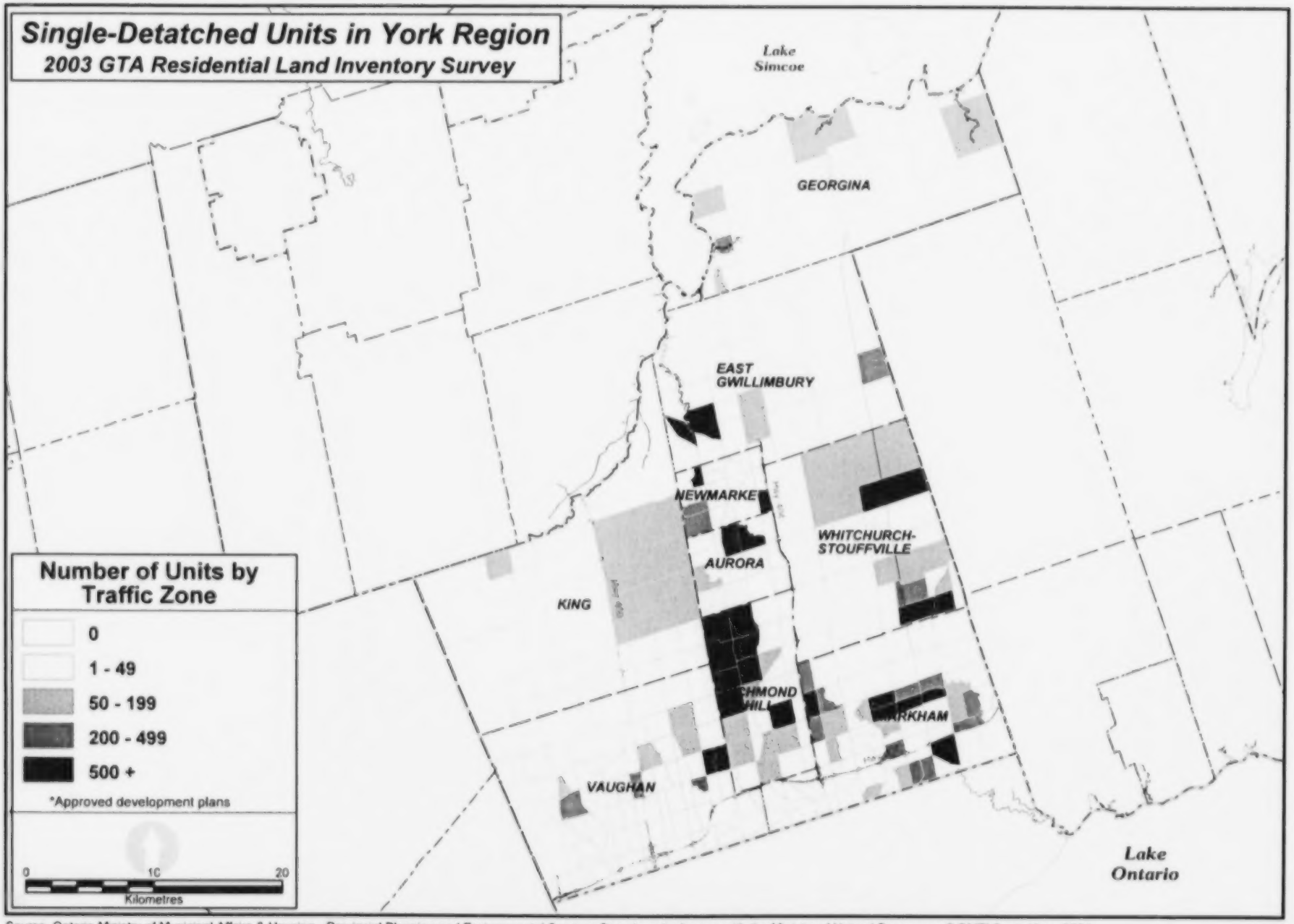
Of notable interest among municipalities which experienced a decrease in their overall duration of supply, Newmarket's duration of supply dropped to 7.2 years for scenario A from 12.4 years in 2001, however, duration of supply for scenario C remained unchanged in 2003 at 9.4 years. As expected, East Gwillimbury's duration of supply decreased from 2001 to 48.9 years for scenario A from 61.2 years in 2001 but increased to 45.1 years for scenario C from 34.9 years in 2001. Duration of supply for Markham and Georgina were slightly smaller in 2003 for both scenarios A and C. Markham had 4.9 years of supply for scenario A and 5.5 years of supply for scenario C, while Georgina had 3.4 years and 3.3 years of supply for scenarios A and C, respectively.

The duration of supply in specific area municipalities tells a story of tightening housing supply markets. Vaughan's supply of all housing types continues to stand below the three-year land supply target set by the Provincial Policy Statement in terms of overall supply duration, at 1.4 years for both scenarios A and C. Vaughan's supply of apartments for scenario A is the exception, with 4.3 years worth of supply. The supply of singles in Vaughn is tightest in York Region at 1.1 years for scenarios A and C. The supply of singles for all other area municipalities was above the provincial threshold. Georgina's supply of semis and row houses also were below the three year target in 2003. Semis were at 1.3 years for scenario A and 2.3 years for scenario C, while rows were at 2.0 years and 1.5 years for scenarios A and C, respectively.

Table 10 below shows the change in the number of units in additional supply between 2001 and 2003. As the table below indicates, single-detached units continue to be the largest stock of additional supply in York Region, however, dropping slightly from 2001 to 66% of the total units in additional supply. The majority of this additional supply of singles can be found in Whitchurch-Stouffville with 5,921units followed by Georgina with 4,735 units and Markham with 4,453 units. Among York Region's municipalities, Markham continues to have by far the largest supply of units in the additional supply category with about 10,750 units spread among all four housing categories.

Table 10: Inventory of Units in Additional Supply – York Region

House Type	2001	Proportion	2003	Proportion	Net Change	% Change
Singles	25,339	69.6%	18,723	66.4%	-6,616	-26.1%
Semis	2,271	6.2%	2,422	8.6%	151	+6.6%
Rows	4,665	12.8%	3,499	12.4%	-1,166	-25.0%
Apartments	4,116	11.3%	3,566	12.6%	-550	-13.4%
Total	**36,391**	**100%**	**28,210**	**100%**	**-8,181**	**-153.3%**



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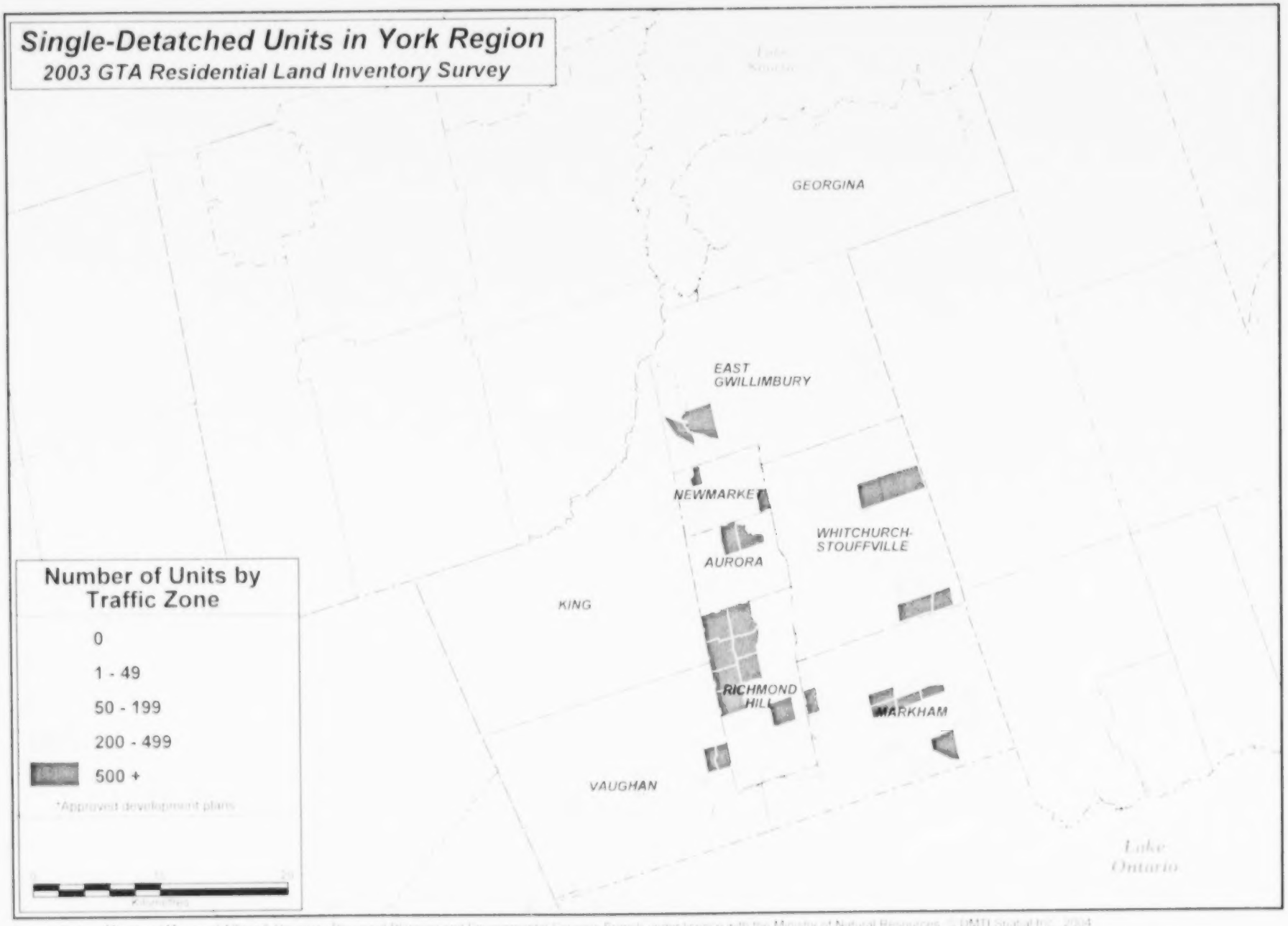

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APPENDIX I: SURVEY DEFINITIONS

GTA

The Greater Toronto Area (GTA) consists of the five following regions: Durham, Halton, City of Toronto, Peel and York. The GTA is roughly made up from the Toronto CMA (excluding Orangeville, New Tecumseh and Bradford-West Gwillimbury), the Oshawa CMA (plus Brock and Scugog), and Burlington (which is part of the Hamilton CMA)

A ***detached house*** is a residential structure containing one dwelling that is completely separated on all sides from any other dwelling or structure. Examples include: bungalows, split-level houses, one and a half storey houses, two storey houses and link homes. Made to convert houses should also be included in this category.

It should be noted that while mobile homes are not included in the above categories, prefabricated houses, which are not movable on their own chassis may be classified as detached houses.

A ***semi-detached house*** is a dwelling which is physically connected with one other dwelling. There is no means of internal access from one dwelling to the next.

The physical connection is vertical and must be above-ground, and may consist of: a common wall separating the two dwellings; a common wall separating the garages attached to each dwelling; or a physical connection between the carports attached to each residential structure.

Row houses are ground-oriented dwellings attached to two or more similar units so that the resulting row structure contains three or more units. Quattroplexes are also classified as row housing.

Other multiples cover duplexes, triplexes, stacked townhouses, maisonettes and other residential structures containing up to five units.

The ***apartment*** category applies to units not covered by the above categories, including those in apartment buildings (high rise and low rise), and those located in mixed use buildings.

Stages of Approval

The survey identifies four stages of approval through which a development application can pass. For each proposed development, the number of units by type has been entered under one of four stages of approval. The survey collects information based on development approvals obtained as of January 1, 2001.

It is not necessary for a project to proceed through all four stages of approval. For example, an application which involves a site which already has an appropriate official plan designation would begin in Stage 2.

Stage 1: Council adopted OPA with development application

A development application is in Stage 1 when:

(i) council has adopted an OPA, but this OPA has not been approved by the approval authority; and

(ii) the developer has submitted a development application and has initiated discussions with respect to other planning approvals.

Cases where an OPA has been approved by Council (e.g., to allow for a change of use from industrial to residential), but where there are **no** specific development plans, are not considered to be development applications for the purposes of this survey.

Stage 2: OPA approved. Other necessary planning approvals in process

A development application is in Stage 2 when:

(i) an OPA is not needed, or the required OPA has been adopted by Council and approved by the approval authority; and

(ii) applications have been submitted for other applicable planning approvals in support of the proposed development (e.g., rezoning, plans of subdivision, severance) and at least some of these are still "in process". Zoning by-law amendments and severances which have been approved at the local level are considered to be "in process" until the appeal period has expired. Plans of subdivision are considered to be "in process" until they have been registered.

An additional column was previously included under Stage 2 dealing with draft approved plans of subdivision. If a development application is a plan of subdivision, information must be entered under this column indicating

whether the plan of subdivision **has or has not** received draft plan approval. This is done by entering yes or no.

Stage 3: Site Plan Control and/or Plan of Condominium

A development application is in Stage 3 when:

(i) all applicable planning approvals (OPA, zoning, plan of subdivision, severance) except for site plan approval have been obtained and site plan approval is required; and/or

(ii) plan of condominium approval is required.

If a plan of condominium is submitted for approval after building permits have been issued, the application should not be included in the survey.

Stage 4: All planning approvals in place

A development application is in Stage 4 when:

(i) all applicable planning approvals (OPA, zoning, plan of subdivision, severance and site plan agreement) have been finalized; and

(ii) building permits have not yet been issued, **or** else have been issued for only some of the units.

Only the units for which **no permits** have been issued should be included in Stage 4 of the survey.

A development application which received all planning approvals prior to January 1, 1996, but where no building permits have been issued, is generally no longer considered an active development application. Where possible, when a building permit lapses, the unit(s) for which the building permit(s) were issued should be returned to Stage 4.

APPENDIX II: ABSORPTION RATES

GREATER TORONTO AREA

Scenario A	*Singles*	*Semis*	*Rows*	*Apts*	*Total*
Durham	3,305	489	363	76	4,233
Halton	2,336	528	1,214	282	4,360
City of Toronto	1,568	755	911	10,461	13,695
Peel	6,790	2,748	1,628	824	11,990
York	7,925	1,308	1,884	758	11,875
GTA	**21,924**	**5,828**	**6,000**	**12,401**	**46,153**

Scenario B	*Singles*	*Semis*	*Rows*	*Apts*	*Total*
Durham	4,958	734	545	114	6,350
Halton	3,504	792	1,821	423	6,540
City of Toronto	2,352	1,133	1,367	15,692	20,543
Peel	10,185	4,122	2,442	1,236	17,985
York	11,888	1,962	2,826	1,137	17,813
GTA	**32,886**	**8,742**	**9,000**	**18,602**	**69,230**

Scenario C	*Singles*	*Semis*	*Rows*	*Apts*	*Total*
Durham	2,940	465	448	132	3,985
Halton	2,327	368	1,067	659	4,421
City of Toronto	1,288	569	902	5,965	8,724
Peel	5,391	2,356	1,595	732	10,074
York	7,384	1,440	2,235	766	11,825
GTA	**19,330**	**5,198**	**6,247**	**8,254**	**39,029**

APPENDIX II: ABSORPTION RATES

DURHAM REGION

Scenario A	*Singles*	*Semis*	*Rows*	*Apts*	*Total*
Oshawa	636	34	0	0	670
Brock	23	0	0	0	23
Pickering	146	36	85	0	267
Scugog	177	0	0	0	177
Uxbridge	131	0	0	30	161
Whitby	1,109	335	0	0	1,444
Ajax	646	26	220	1	893
Clarington	437	58	58	45	598
Durham	**3,305**	**489**	**363**	**76**	**4,233**

Scenario B	*Singles*	*Semis*	*Rows*	*Apts*	*Total*
Oshawa	954	51	0	0	1,005
Brock	35	0	0	0	35
Pickering	219	54	128	0	401
Scugog	266	0	0	0	266
Uxbridge	197	0	0	45	242
Whitby	1,664	503	0	0	2,166
Ajax	969	39	330	2	1,340
Clarington	656	87	87	68	897
Durham	**4,958**	**734**	**545**	**114**	**6,350**

Scenario C	*Singles*	*Semis*	*Rows*	*Apts*	*Total*
Oshawa	512	15	39	19	585
Brock	22	0	0	1	23
Pickering	243	49	61	51	404
Scugog	121	0	0	0	121
Uxbridge	97	0	0	12	109
Whitby	966	199	132	25	1,322
Ajax	544	22	141	4	711
Clarington	435	180	75	20	710
Durham	**2,940**	**465**	**448**	**132**	**3,985**

APPENDIX II: ABSORPTION RATES

HALTON REGION

Scenario A	*Singles*	*Semis*	*Rows*	*Apts*	*Total*
Oakville	605	127	395	122	1,249
Milton	806	330	243	0	1,379
Halton Hills	369	16	24	0	409
Burlington	556	55	552	160	1,323
Halton	**2,336**	**528**	**1,214**	**282**	**4,360**

Scenario B	*Singles*	*Semis*	*Rows*	*Apts*	*Total*
Oakville	908	191	593	183	1,874
Milton	1,209	495	365	0	2,069
Halton Hills	554	24	36	0	614
Burlington	834	83	828	240	1,985
Halton	**3,504**	**792**	**1,821**	**423**	**6,540**

Scenario C	*Singles*	*Semis*	*Rows*	*Apts*	*Total*
Oakville	1,065	103	342	124	1,634
Milton	361	140	110	13	624
Halton Hills	395	25	65	9	494
Burlington	506	100	550	513	1,669
Halton	**2,327**	**368**	**1,067**	**659**	**4,421**

APPENDIX II: ABSORPTION RATES

CITY OF TORONTO

Scenario A	Singles	Semis	Rows	Apts	Total
East District	751	264	148	730	1,893
West District	164	93	200	916	1,373
South District	190	342	204	4,797	5,533
North District	463	56	359	4,018	4,896
City of Toronto	**1,568**	**755**	**911**	**10,461**	**13,695**

Scenario B	Singles	Semis	Rows	Apts	Total
East District	1,127	396	222	1,095	2,840
West District	246	140	300	1,374	2,060
South District	285	513	306	7,196	8,300
North District	695	84	539	6,027	7,344
City of Toronto	**2,352**	**1,133**	**1,367**	**15,692**	**20,543**

Scenario C	Singles	Semis	Rows	Apts	Total
East District	470	156	299	455	1,380
West District	163	71	218	527	979
South District	159	282	110	2,851	3,402
North District	496	60	275	2,132	2,963
City of Toronto	**1,288**	**569**	**902**	**5,965**	**8,724**

APPENDIX II: ABSORPTION RATES

PEEL REGION

Scenario A	*Singles*	*Semis*	*Rows*	*Apts*	*Total*
Mississauga	2,174	1,668	1,178	775	5,795
Caledon	475	53	8	0	536
Brampton	4,141	1,027	4,42	49	5,659
Peel	**6,790**	**2,748**	**1,628**	**824**	**11,990**

Scenario B	*Singles*	*Semis*	*Rows*	*Apts*	*Total*
Mississauga	3,261	2,502	1,767	1,163	8,693
Caledon	713	80	12	0	804
Brampton	6,212	1541	663	74	8,489
Peel	**10,185**	**4,122**	**2,442**	**1,236**	**17,985**

Scenario C	*Singles*	*Semis*	*Rows*	*Apts*	*Total*
Mississauga	1,983	1,548	1,053	680	5,264
Caledon	461	106	34	0	601
Brampton	2,947	702	508	52	4,209
Peel	**5,391**	**2,356**	**1,595**	**732**	**10,074**

APPENDIX II: ABSORPTION RATES

YORK REGION

Scenario A	*Singles*	*Semis*	*Rows*	*Apts*	*Total*
Aurora	255	36	99	0	390
Markham	2,433	444	537	326	3,740
East Gwillimbury	60	0	0	0	60
Georgina	266	43	58	0	367
King	71	0	0	0	71
Newmarket	360	21	147	72	600
Richmond Hill	1,287	134	457	217	2,095
Vaughan	3,036	630	586	143	4,395
Whitchurch-Stouffville	157	0	0	0	157
York	**7,925**	**1,308**	**1,884**	**758**	**11,875**

Scenario B	*Singles*	*Semis*	*Rows*	*Apts*	*Total*
Aurora	383	54	149	0	585
Markham	3,650	666	806	489	5,610
East Gwillimbury	90	0	0	0	90
Georgina	399	65	87	0	551
King	107	0	0	0	107
Newmarket	540	32	221	108	900
Richmond Hill	1,931	201	686	326	3,143
Vaughan	4,554	945	879	215	6,593
Whitchurch-Stouffville	236	0	0	0	236
York	**11,888**	**1,962**	**2,826**	**1,137**	**17,813**

Scenario C	*Singles*	*Semis*	*Rows*	*Apts*	*Total*
Aurora	154	41	133	4	332
Markham	2,043	351	708	241	3,343
East Gwillimbury	65	0	0	0	65
Georgina	274	24	79	0	377
King	74	2	0	0	76
Newmarket	310	27	89	34	460
Richmond Hill	1,409	187	554	213	2,363
Vaughan	2,915	808	661	274	4,658
Whitchurch-Stouffville	140	0	11	0	151
York	**7,384**	**1,440**	**2,235**	**766**	**11,825**

APPENDIX III: UNITS IN APPROVED DEVELOPMENT PLANS

Estimated Duration of Supply (Years): Scenario A, B, C
Units in Draft Approved and Registered Plans and Approved Development Plans

GREATER TORONTO AREA

Region	*Singles*	*A*	*B*	*C*	*Semis*	*A*	*B*	*C*
Durham	13,085	4.0	2.6	4.5	3,512	7.2	4.8	7.6
Halton	7,942	3.4	2.3	3.4	472	0.9	0.6	1.3
City of Toronto	322	0.2	0.1	0.3	394	0.5	0.3	0.7
Peel	16,527	2.4	1.6	3.1	3,446	1.3	0.8	1.5
York	33,556	4.2	2.8	4.5	6,190	4.7	3.2	4.3
GTA	**71,432**	**3.3**	**2.2**	**3.7**	**14,014**	**2.4**	**1.6**	**2.7**

Region	*Row*	*A*	*B*	*C*	*Apart.*	*A*	*B*	*C*
Durham	3,627	10.0	6.7	8.1	3,291	43.3	28.6	24.9
Halton	4,237	3.5	2.3	4.0	1,721	6.1	4.1	2.6
City of Toronto	276	0.3	0.2	0.3	50,577	4.8	3.2	8.5
Peel	4,200	2.6	1.7	2.6	28,792	34.9	23.3	39.3
York	11,312	6.0	4.0	5.1	8,765	11.6	7.7	11.4
GTA	**23,652**	**3.9**	**2.6**	**3.8**	**93,146**	**7.5**	**5.0**	**11.3**

Region	*Total*	*Scenario A*	*Scenario B*	*Scenario C*
Durham	23,515	5.6	3.7	5.9
Halton	14,372	3.3	2.2	3.3
City of Toronto	51,569	3.8	2.5	5.9
Peel	52,965	4.4	2.9	5.3
York	59,823	5.0	3.4	5.1
GTA	**202,244**	**4.4**	**2.9**	**5.2**

APPENDIX III: UNITS IN APPROVED DEVELOPMENT PLANS*
Estimated Duration of Supply (Years): Scenario A, B, C
Units in Draft Approved and Registered Plans and Approved Development Plans

DURHAM REGION

Region	*Singles*	*A*	*B*	*C*	*Semis*	*A*	*B*	*C*
Oshawa	3,411	5.4	3.6	6.7	124	3.6	2.4	8.3
Brock	378	16.4	10.8	17.2	30	N/A	N/A	N/A
Pickering	130	0.9	0.6	0.5	42	1.2	0.8	0.9
Scugog	614	3.5	2.3	5.1	44	N/A	N/A	N/A
Uxbridge	633	4.8	3.2	6.5	218	N/A	N/A	N/A
Whitby	4,394	4.0	2.6	4.5	1,258	3.8	2.5	6.3
Ajax	1,745	2.7	1.8	3.2	148	5.7	3.8	6.7
Clarington	1,780	4.1	2.7	4.1	1,648	28.4	18.9	9.2
Durham	**13,085**	**4.0**	**2.6**	**4.5**	**3,512**	**7.2**	**4.8**	**7.6**

Region	*Row*	*A*	*B*	*C*	*Apart.*	*A*	*B*	*C*
Oshawa	503	N/A	N/A	12.9	743	N/A	N/A	39.1
Brock	182	N/A	N/A	N/A	35	N/A	N/A	35.0
Pickering	129	1.5	1.0	2.1	696	N/A	N/A	13.6
Scugog	0.0	N/A	N/A	N/A	0.0	N/A	N/A	N/A
Uxbridge	126	N/A	N/A	N/A	0.0	0.0	0.0	0.0
Whitby	1,842	N/A	N/A	14.0	1,423	N/A	N/A	>50
Ajax	156	0.7	0.5	1.1	0.0	0.0	0.0	0.0
Clarington	689	11.9	7.9	9.2	394	8.8	5.8	19.7
Durham	**3,627**	**10.0**	**6.7**	**8.1**	**3,291**	**43.3**	**28.9**	**24.9**

Region	*Total*	*Scenario A*	*Scenario B*	*Scenario C*
Oshawa	4,781	7.1	4.8	8.2
Brock	625	27.2	17.9	27.2
Pickering	997	3.7	2.5	2.5
Scugog	658	3.7	2.5	5.4
Uxbridge	977	6.1	4.0	9.0
Whitby	8,917	6.2	4.1	6.7
Ajax	2,049	2.3	1.5	2.9
Clarington	4,511	7.5	5.0	6.4
Durham	**23,515**	**5.6**	**3.7**	**5.9**

* N/A = It is not possible to estimate the duration of supply, as no building permits were issued for these units
Where the estimated duration of supply is greater than 50 years, ">50" is entered in the table.
Approved Development Plans include units in draft approved and registered plans of subdivision and units in other development plans that are either fully approved or are proceeding through site plan approval.

APPENDIX III: UNITS IN APPROVED DEVELOPMENT PLANS*
Estimated Duration of Supply (Years): Scenario A, B, C
Units in Draft Approved and Registered Plans and Approved Development Plans

HALTON REGION

Region	*Singles*	*A*	*B*	*C*	*Semis*	*A*	*B*	*C*
Oakville	3,141	5.2	3.5	2.9	104	0.8	0.5	1.0
Milton	1,208	1.5	1.0	3.3	274	0.8	0.6	2.0
Halton Hills	1,984	5.4	3.6	5.0	28	1.8	1.2	1.1
Burlington	1,609	2.9	1.9	3.2	66	1.2	0.8	0.7
Halton	**7,942**	**3.4**	**2.3**	**3.4**	**472**	**0.9**	**0.6**	**1.3**

Region	*Row*	*A*	*B*	*C*	*Apart.*	*A*	*B*	*C*
Oakville	1,470	3.7	2.5	4.3	115	0.9	0.6	0.9
Milton	1,530	6.3	4.2	13.9	0	N/A	N/A	0.0
Halton Hills	402	16.8	11.2	6.2	150	N/A	N/A	16.7
Burlington	835	1.5	1.0	1.5	1,456	9.1	6.1	2.8
Halton	**4,237**	**3.5**	**2.3**	**4.0**	**1,721**	**6.1**	**4.1**	**2.6**

Region	*Total*	*Scenario A*	*Scenario B*	*Scenario C*
Oakville	4,830	3.9	2.6	3.0
Milton	3,012	2.2	1.5	4.8
Halton Hills	2,564	6.3	4.2	5.2
Burlington	3,966	3.0	2.0	2.4
Halton	**14,372**	**3.3**	**2.2**	**3.3**

* N/A = It is not possible to estimate the duration of supply, as no building permits were issued for these units
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APPENDIX III: UNITS IN APPROVED DEVELOPMENT PLANS*
Estimated Duration of Supply (Years): Scenario A, B, C
Units in Draft Approved and Registered Plans and Approved Development Plans

CITY OF TORONTO

Municipality	*Singles*	*A*	*B*	*C*	*Semis*	*A*	*B*	*C*
East District	19	0.0	0.0	0.0	201	0.8	0.5	1.3
West District	0	0.0	0.0	0.0	4	0.0	0.0	0.1
South District	2	0.0	0.0	0.0	145	0.4	0.3	0.5
North District	301	0.7	0.4	0.6	44	0.8	0.5	0.7
City of Toronto	**322**	**0.2**	**0.1**	**0.3**	**394**	**0.5**	**0.3**	**0.7**

Municipality	*Row*	*A*	*B*	*C*	*Apart.*	*A*	*B*	*C*
East District	56	0.4	0.3	0.2	7,519	10.3	6.9	16.5
West District	35	0.2	0.1	0.2	6,348	6.9	4.6	12.0
South District	101	0.5	0.3	0.9	22,059	4.6	3.1	7.7
North District	84	0.2	0.2	0.3	14,651	3.6	2.4	6.9
City of Toronto	**276**	**0.3**	**0.2**	**0.3**	**50,577**	**4.8**	**3.2**	**8.5**

Municipality	*Total*	*Scenario A*	*Scenario B*	*Scenario C*
East District	7,795	4.1	2.7	5.6
West District	6,387	4.7	3.1	6.5
South District	22,307	4.0	2.7	6.6
North District	15,080	3.1	2.1	5.1
City of Toronto	**51,569**	**3.8**	**2.5**	**5.9**

* N/A = It is not possible to estimate the duration of supply, as no building permits were issued for these units
Where the estimated duration of supply is greater than 50 years, ">50" is entered in the table.
Approved Development Plans include units in draft approved and registered plans of subdivision and units in other development plans that are either fully approved or are proceeding through site plan approval.

APPENDIX III: UNITS IN APPROVED DEVELOPMENT PLANS*
Estimated Duration of Supply (Years): Scenario A, B, C
Units in Draft Approved and Registered Plans and Approved Development Plans

PEEL REGION

Municipality	*Singles*	*A*	*B*	*C*	*Semis*	*A*	*B*	*C*
Mississauga	5,048	2.3	1.5	2.5	1,571	0.9	0.6	1.0
Caledon	1,785	3.8	2.5	3.9	321	6.1	4.0	3.0
Brampton	9,694	2.3	1.6	3.3	1,554	1.5	1.0	2.2
Peel	**16,527**	**2.4**	**1.6**	**3.1**	**3,446**	**1.3**	**0.8**	**1.5**

Municipality	*Row*	*A*	*B*	*C*	*Apart.*	*A*	*B*	*C*
Mississauga	3,379	2.9	1.9	3.2	26,866	34.7	23.1	39.5
Caledon	104	13.0	8.7	3.1	450	N/A	N/A	N/A
Brampton	717	1.6	1.1	1.4	1,476	30.1	19.9	28.4
Peel	**4,200**	**2.6**	**1.7**	**2.6**	**28,792**	**34.9**	**23.3**	**39.3**

Municipality	*Total*	*Scenario A*	*Scenario B*	*Scenario C*
Mississauga	36,864	6.4	4.2	7.0
Caledon	2,660	5.0	3.3	4.4
Brampton	13,441	2.4	1.6	3.2
Peel	**52,965**	**4.4**	**2.9**	**5.3**

* N/A = It is not possible to estimate the duration of supply, as no building permits were issued for these units
Where the estimated duration of supply is greater than 50 years, ">50" is entered in the table.
Approved Development Plans include units in draft approved and registered plans of subdivision and units in other development plans that are either fully approved or are proceeding through site plan approval.

APPENDIX III: UNITS IN APPROVED DEVELOPMENT PLANS*
Estimated Duration of Supply (Years): Scenario A, B, C
Units in Draft Approved and Registered Plans and Approved Development Plans

YORK REGION

Municipality	*Singles*	*A*	*B*	*C*	*Semis*	*A*	*B*	*C*
Aurora	2,269	8.9	5.9	14.7	348	9.7	6.4	8.5
Markham	9,430	3.9	2.6	4.6	2,235	5.0	3.4	6.4
East Gwillimbury	2,127	35.5	23.6	32.7	217	N/A	N/A	N/A
Georgina	1,022	3.8	2.6	3.7	56	1.3	0.9	2.3
King	308	4.3	2.9	4.2	10	N/A	N/A	5.0
Newmarket	1,942	5.4	3.6	6.3	693	33.0	21.7	25.7
Richmond Hill	10,275	8.0	5.3	7.3	919	6.9	4.6	4.9
Vaughan	3,287	1.1	0.7	1.1	1,059	1.7	1.1	1.3
Whitchurch-Stouffville	2,896	18.4	12.3	20.7	653	N/A	N/A	N/A
York	**33,556**	**4.2**	**2.8**	**4.5**	**6,190**	**4.7**	**3.2**	**4.3**

Municipality	*Row*	*A*	*B*	*C*	*Apart.*	*A*	*B*	*C*
Aurora	753	7.6	5.1	5.7	56	N/A	N/A	14.0
Markham	3,157	5.9	3.9	4.5	3,524	10.8	7.2	14.6
East Gwillimbury	589	N/A	N/A	N/A	0	N/A	N/A	N/A
Georgina	116	2.0	1.3	1.5	43	N/A	N/A	N/A
King	25	N/A	N/A	N/A	65	N/A	N/A	N/A
Newmarket	857	5.8	3.9	9.6	832	11.6	7.7	24.5
Richmond Hill	4,486	9.8	6.5	8.1	3,627	16.7	11.1	17.0
Vaughan	1,329	2.3	1.5	2.0	618	4.3	2.9	2.3
Whitchurch-Stouffville	0	N/A	N/A	0.0	0	N/A	N/A	N/A
York	**11,312**	**6.0**	**4.0**	**5.1**	**8,765**	**11.6**	**7.7**	**11.4**

Region	*Total*	*Scenario A*	*Scenario B*	*Scenario C*
Aurora	3,426	8.8	5.9	10.3
Markham	18,346	4.9	3.3	5.5
East Gwillimbury	2,933	48.9	32.6	45.1
Georgina	1,237	3.4	2.2	3.3
King	408	5.7	3.8	5.4
Newmarket	4,324	7.2	4.8	9.4
Richmond Hill	19,307	9.2	6.1	8.2
Vaughan	6,293	1.4	1.0	1.4
Whitchurch-Stouffville	3,549	22.6	15.0	23.5
York	**59,823**	**5.0**	**3.4**	**5.1**

* N/A = It is not possible to estimate the duration of supply, as no building permits were issued for these units
Where the estimated duration of supply is greater than 50 years, ">50" is entered in the table.
Approved Development Plans include units in draft approved and registered plans of subdivision and units in other development plans that are either fully approved or are proceeding through site plan approval.

APPENDIX IV: ADDITIONAL SUPPLY*

Additional Supply: Units Waiting For Final OPA and/or Draft Approval

Greater Toronto Area

Municipality	*Singles*	*Semis*	*Rows*	*Apartments*
Durham	7,162	795	1,194	1,349
Halton	6,381	186	1,631	2,896
City of Toronto	2	87	307	26,015
Peel	12,018	3,920	3,350	5,152
York	18,723	2,422	3,499	3,566
GTA	**44,286**	**7,410**	**9,981**	**38,978**

Durham Region

Municipality	*Singles*	*Semis*	*Rows*	*Apartments*
Oshawa	1,324	0	243	674
Brock	39	0	0	0
Pickering	301	134	294	173
Scugog	45	0	0	112
Uxbridge	384	30	90	0
Whitby	0	0	0	180
Ajax	4,883	358	451	0
Clarington	186	273	116	210
Durham	**7,162**	**795**	**1,194**	**1,349**

Halton Region

Municipality	*Singles*	*Semis*	*Rows*	*Apartments*
Oakville	1,810	130	202	1,014
Milton	2,020	48	408	540
Halton Hills	1,301	6	390	264
Burlington	1,250	2	631	1,078
Halton	**6,381**	**186**	**1,631**	**2,896**

* Includes units in plans which have received council adopted Official Plan Amendments and/or draft plan approvals.

APPENDIX IV: ADDITIONAL SUPPLY*

Additional Supply: Units Waiting for Final OPA and/or Draft Approval

City of Toronto

Municipality	*Singles*	*Semis*	*Rows*	*Apartments*
East District	0	0	10	1,341
West District	0	5	204	6,041
South District	2	78	77	10,410
North District	0	4	16	8,223
City of Toronto	**2**	**87**	**307**	**26,015**

Peel Region

Municipality	*Singles*	*Semis*	*Rows*	*Apartments*
Mississauga	1,243	951	1,516	4,009
Caledon	339	98	0	0
Brampton	10,436	2,871	1,834	1,143
Peel	**12,018**	**3,920**	**3,350**	**5,152**

York Region

Municipality	*Singles*	*Semis*	*Rows*	*Apartments*
Aurora	924	0	75	65
Markham	4,453	1,719	1,969	2,607
East Gwillimbury	291	182	19	90
Georgina	4,735	302	456	230
King	29	0	0	0
Newmarket	6	0	91	0
Richmond Hill	759	21	571	234
Vaughan	1,605	198	238	340
Whitchurch-Stoufville	5,921	0	80	0
York	**18,723**	**2,422**	**3,499**	**3,566**

* Includes units in plans which have received council adopted Official Plan Amendments and/or draft plan approvals.

APPENDIX V: NEW DEVELOPMENT VERSUS REDEVELOPMENT*
Units in Draft Approved Development Plans and Additional Supply

GREATER TORONTO AREA

Total Number of Development Applications

Region	Total	New	Redevelopment
Durham	341	313	28
Halton	244	208	36
City of Toronto	428	1	427
Peel	480	480	0
York	554*	490	55
GTA	**2,047**	**1,492**	**546**

Total Units in New Development Applications

Region	Singles	Semis	Rows	Apt.	Total
Durham	19,975	4,117	4,547	4,379	33,018
Halton	14,106	624	5,572	3,751	24,053
City of Toronto	0	0	0	203	203
Peel	28,545	7,366	7,550	33,944	77,405
York	49,777	8,290	13,539	11,357	82,963
GTA	**112,403**	**20,397**	**31,208**	**53,634**	**217,642**

Total Units in Redevelopment Applications

	Singles	Semis	Rows	Apt.	Total
Durham	272	190	274	261	997
Halton	217	34	296	865	1,412
City of Toronto	324	481	583	76,389	77,777
Peel	0	0	0	0	0
York	998	135	688	974	2,795
GTA	**1,811**	**840**	**1,841**	**78,489**	**82,981**

* New Development occurs on lands not previously developed where the use has been predominantly non-urban. Redevelopment occurs where the development application applies to a parcel of land which is currently or was previously used for urban purposes.

* Includes nine (9) development applications containing both new and redeveloped lots in certain planning districts of Richmond Hill. The development applications include a total of 2275 units; 1504 Singles, 187 Semis and 584 Row houses. At the time of data collection these were captured as whole blocks and not counted as separate development applications.